THE GORDIAN GROUP®

THE STANDARD FOR JOB ORDER CONTRACTING®

PROGEN®

User's Manual

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Introduction

Why PROGEN?

✓ NOTE

PROGEN is an internet based JOC Management software that can be used wherever an internet connection is present.

PROGEN is The Gordian Group's JOC Management Software package that allows for increased JOC productivity.

About this Manual

This User's Manual is organized in the order of The Gordian Group's Job Order Contracting System. Each chapter is a capsule of information that is complete enough to accomplish specific tasks or processes in the JOC system.

1) Symbols and Descriptions used in this book

   a) A 'TREEVIEW' is the hierarchy listing of files and folders similar to the left panel of the standard Windows Explorer, and is located on the left side of the window.

   b) A 'LISTVIEW' shows information located within the 'TREEVIEW' similar to the right panel of the standard Windows Explorer screen and is located on the right side of the window. This may also be referred to as the 'DETAILS' side.

   c) IMPORTANT INFORMATION, such as BUTTONS, KEYS and other ACTIONS will be UPPER CASE and surrounded by single quotes in the description text; i.e. (type in the 'ADDRESS' bar of Explorer) or (click the 'ENTER' key).

   d) A circle and/or arrow highlight an area within a sample window being referred to. These icons are a visual reference to the directions given.

   e) The notes in the left margin of the instructional text offer insight to important features, benefits and ways to avoid problems, as explained below:

NEW

The NEW icon indicates features that are new to PROGEN. Remember, PROGEN is always being improved.

✓ NOTE

The NOTE icon indicates valuable information for easier use.

RIGHT CLICK

The RIGHT CLICK icon indicates features that display a drop down menu.

TECHNICAL

The TECHNICAL icon indicates features that are more technical, typically for advanced users.

TIPS

The TIPS icon indicates features and shortcuts in PROGEN.

WARNING

The WARNING icon indicates common pitfalls and what not to do using PROGEN.

PROGEN Accessibility Options

Because PROGEN was modeled after the Windows interface, many keyboard shortcuts and hot keys can be used within PROGEN. The following sections will detail these options.

Magnifier

Magnifier, the magnification program built into Windows Vista, enables you to choose magnification levels from 2 to 16 times the original, and to choose to track the mouse, the keyboard, or text editing.

There are two ways to start Magnifier:

- **Start Magnifier** from **Quick Access to common tools** for use in the current session, or
- **Turn on Magnifier** so that it automatically starts each time you log on.

Start Magnifier for the current session

	Mouse actions	Keyboard actions
1	To open the **Ease of Access Center**, select: • **Start.** • **Control Panel.** • **Ease of Access.** • **Ease of Access Center.**	To open the **Ease of Access Center**, press: • Windows logo key +U.
2	Under **Quick access to common tools**, select: • **Start Magnifier**.	Under **Quick access to common tools**, select: • **Start Magnifier** by pressing ALT+G.

Turn on Magnifier so that it starts automatically each time you log on to your computer

	Mouse actions	Keyboard actions
1	Under **Explore all settings**, select: • **Make the computer easier to see**.	Under **Explore all settings**, select: • **Make the computer easier to see**, by pressing TAB, then ENTER.
2	Under **Make things on the screen larger**, select: • **Turn on Magnifier**. • Select **Save**.	Under **Make things on the screen larger**, select: • **Turn on Magnifier** by pressing ALT+N. • Select **Save** by pressing ALT+S.

Narrator

Narrator is a text-to-speech program (or basic screen reader) that is built into Windows Vista. Narrator reads menus without leaving the active window. Individuals who use Narrator will also find a more pleasant, natural sounding voice in Windows Vista.

There are two ways to start Narrator:

- **Start Narrator** from **Quick Access to common tools** for use in the current session, or
- **Turn on Narrator** so that it starts automatically each time you log on.

Start Narrator for the current session

	Mouse actions	Keyboard actions
1	To open the **Ease of Access Center**, select: • **Start**. • **Control Panel**. • **Ease of Access**. • **Ease of Access Center**.	To open the **Ease of Access Center**, press: • Windows logo key +U.
2	Under **Quick access to common tools**, select: • **Start Narrator**.	Under **Quick access to common tools**, select: • **Start Narrator** by pressing ALT+N.

On-Screen Keyboard

On-Screen Keyboard lets you type and interact with your computer using an alternative input device like a switch, rather than the physical keyboard. On-Screen Keyboard displays a visual keyboard with all of the standard keys. You can select keys using the mouse or another pointing device, a small groups of keys, or just one key, depending on how you set up On-Screen Keyboard.

There are two ways to start On-Screen Keyboard:

- **Start On-Screen Keyboard** from **Quick Access to common tools** for use in the current session, or
- **Turn on On-Screen Keyboard** so that it automatically starts each time you log on.

Start On-Screen Keyboard for the current session

	Mouse actions	Keyboard actions
1	To open the **Ease of Access Center**, select: • **Start.** • **Control Panel.** • **Ease of Access.** • **Ease of Access Center.**	To open the **Ease of Access Center**, press: • Windows logo key +U.
2	Under **Quick access to common tools**, select: • **Start On-Screen Keyboard**.	Under **Quick access to common tools**, select: • **Start On-Screen Keyboard** by pressing ALT+K.

Turn on On-Screen Keyboard so that it starts automatically each time you log on to your computer

	Mouse actions	Keyboard actions
1	Under **Explore all settings**, select: • **Use the computer without a mouse or keyboard**.	Under **Explore all settings**, select: • **Use the computer without a mouse or keyboard** by pressing TAB, then ENTER.
2	Under **Type using a pointing device**, select: • **Use On-Screen Keyboard**. • Select **Save**.	Under **Type using a pointing device**, select: • **Use On-Screen Keyboard** by pressing ALT+K. • Select **Save** by pressing ALT+S.

Hot Keys

What is a hot key?
Hot keys, or shortcuts, are keys or sets of keys that can be used to perform specific functions that would typically be done by using a mouse to click through various menus. By using these shortcuts, the user is not only saving time, but for a visually impaired user, this also makes the system more accessible.

List of hot keys:
Below is a full listing of the hot keys associated with Windows Vista. Each operating system has its own hot keys, so if you are not using Vista, be sure to check the manufacturers website for listings specific to your program.

The following Ease of Access Shortcuts are available in PROGEN

- **Right SHIFT for eight seconds**
  Turns filter keys off or on
- **SHIFT five times**
  Turns Sticky Keys off or on (Sticky Keys are a feature that allow a user to press certain keys such as SHIFT, ALT, or CTRL and have it remain active until the next time that key is pressed)
- **NUM LOCK for five seconds**
  Turns Toggle Keys off or on (Toggle Keys are an accessibility feature designed to play sound cues when certain locking keys are pressed. For example: CAPS LOCK, NUM LOCK, or SCROLL LOCK)

The following Ease of Access Shortcuts are not available in PROGEN

- **Left ALT + left SHIFT + PRINT SCREEN**
  Turns the High Contrast feature off or on
- **Left ALT + left SHIFT + NUM LOCK**
  Turns Mouse Keys off or on
- **Windows logo key + U**
  Opens the Ease of Access Center, which is defined on the Microsoft website as "a centralized location where you can get quick access to adjust accessibility settings and manage assistive technology programs."

Windows operating systems follow the guidelines below for use of hotkeys. Apple systems may vary, slightly. The following list shows what the Windows OS does and which functions are applied to PROGEN®.

General Keyboard Shortcuts

- **CTRL+C**
  Copies the highlighted selection
- **CTRL+X**
  Cuts the highlighted selection
- **CTRL+V**
  Pastes the highlighted selection
- **CTRL+Z**
  Undoes the last action performed
- **CTRL+Y**
  Redoes the last action performed

- **DELETE**
  Deletes the selection and moves it to the Recycle Bin
- **SHIFT+DELETE**
  Deletes the selection permanently without moving it to the Recycle Bin
- **CTRL + RIGHT ARROW**
  Moves the cursor to the beginning of the next word
- **CTRL + LEFT ARROW**
  Moves the cursor to the beginning of the previous word
- **CTRL + DOWN ARROW**
  Moves the cursor to the beginning of the next paragraph
- **CTRL + UP ARROW**
  Moves the cursor to the beginning of the previous paragraph
- **CTRL + SHIFT + an ARROW key**
  Selects a block of text
- **SHIFT + an ARROW key**
  Selects more than one item in a window or on the desktop; or selects text per letter within a document
- **CTRL + A**
  Selects all items in a document or window
- **ALT + F4**
  Closes the active item, or exits the active program
- **ALT + SPACEBAR**
  Opens the shortcut menu for the active window (In PROGEN®, it will only display the banner functions – Move, Size, Minimize, etc.)
- **CTRL + F4**
  Closes the active document (in programs that allow you to have multiple documents open at the same time – For PROGEN®, it will close the active Explorer window if you have more than one Explorer open)
- **SHIFT + F10**
  Displays the shortcut menu for the selected item
- **ALT + underlined letter (of options in the menu bar for that application)**
  Displays the corresponding menu (In PROGEN®, this only applies to the Menu Bar)
- **ALT + underlined letter (of options within each menu within an application)**
  Performs the menu command (or other underlined command - In PROGEN®, this only applies to the Menu Bar)
- **F5**
  Refreshes the active window

The following General Keyboard Shortcuts are not available in PROGEN

- **F2**
  Renames object
- **F3**
  Searches for a file or folder
- **ALT + ENTER**
  Displays properties for the selected item

- **ALT + TAB**
  Switches between open items
- **CTRL + ALT + TAB**
  Uses the arrow keys to switch between open items
- **Windows logo key + TAB**
  Cycles through programs on the taskbar by using Windows Flip 3-D (a tool new to Windows Vista that allows a user to view live thumbnails of all open windows in a 3-D setting)
- **CTRL + Windows logo key + TAB**
  Uses the arrow keys to cycle through programs on the taskbar by using Windows Flip 3-D (a tool new to Windows Vista that allows a user to view live thumbnails of all open windows in a 3-D setting)
- **ALT + ESC**
  Cycles through items in the order in which they were opened
- **F6**
  Cycles through screen elements in a window or on the desktop
- **F4**
  Displays the Address bar list in Windows Explorer
- **CTRL + ESC**
  Opens the Start menu
- **F10**
  Activates the menu bar in the active program
- **RIGHT ARROW**
  Opens the next menu to the right (once F10 has been pushed), or opens a submenu
- **LEFT ARROW**
  Opens the next menu to the left (once F10 has been pushed), or closes a submenu
- **ALT + UP ARROW**
  Views the folder one level up in Windows Explorer
- **ESC**
  Cancels the current task
- **CTRL + SHIFT + ESC**
  Opens Task Manager
- **SHIFT when you insert a CD**
  Prevents the CD from automatically playing

Dialog Box Keyboard Shortcuts

- **CTRL + TAB**
  Moves forward through tabs
- **CTRL + SHIFT + TAB**
  Moves back through tabs
- **TAB Moves forward through options**
  SHIFT + TAB Moves back through options (fields in PROGEN®)
- **ENTER**
  Replaces clicking the mouse for many selected commands

- **SPACEBAR**
  Selects or clears the check box if the active option is a check box
- **Arrow keys**
  Selects a button if the active option is a group of option buttons
- **F1**
  Displays Help

The following Dialog Box Keyboard Shortcuts are not available in PROGEN

- **ALT + underlined letter**
  Performs the command (or selects the option) that corresponds with that letter
- **F4**
  Displays the items in the active list
- **BACKSPACE**
  Opens a folder one level up if a folder is selected in the Save As or Open dialog box

Microsoft Keyboard Shortcuts (Not applicable to PROGEN)

- **Windows logo key**
  Opens or closes the Start menu
- **Windows logo key + BREAK**
  Displays the System Properties dialog box
- **Windows logo key + D**
  Displays the desktop
- **Windows logo key + M**
  Minimizes all windows
- **Windows logo key + SHIFT + M**
  Restores minimized windows to the desktop
- **Windows logo key + E**
  Opens My Computer
- **Windows logo key + F**
  Searches for a file or folder
- **CTRL + Windows logo key + F**
  Searches for computers (if you are on a network)
- **Windows logo key + L**
  Locks your computer or switches users
- **Windows logo key + R**
  Opens the Run dialog box
- **Windows logo key + T**
  Cycles through programs on the taskbar
- **Windows logo key + TAB**
  Cycles through programs on the taskbar by using Windows Flip 3-D
- **CTRL + Windows logo key + TAB**
  Uses the arrow keys to cycle through programs on the taskbar by using Windows Flip 3-D
- **Windows logo key + SPACEBAR**
  Brings all gadgets to the front and selects Windows Sidebar (a panel on the desktop that keeps your selected gadgets organized and always accessible. This is a new feature to Windows Vista)

- **Windows logo key + G**
  Cycles through Sidebar gadgets
- **Windows logo key + U**
  Opens Ease of Access Center
- **Windows logo key + X**
  Opens Windows Mobility Center (available on premium versions of Vista only, this is where a user can manage their mobile PC settings)

Windows is a registered trademark of Microsoft Corporation in the United States and other countries.

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Part I – Getting Connected

Chapter 1 – Login to PROGEN through Citrix for the First Time

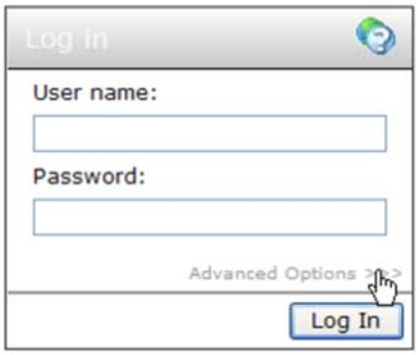
Downloading and Installing Citrix

1) To begin using Citrix to login to PROGEN, launch Internet Explorer.

2) Enter the following in the address bar of Internet Explorer: 'WWW.EGORDIAN.COM' and press 'ENTER' on the keyboard or click the 'GO' or Arrow button to the right of the URL with the mouse pointer.

3) Single Click on the PROGEN panel – this will open the PROGEN login screen within the eGordian® website.

4) Click the “Advanced Options >>>” link below the password field.



5) This will expand the Log In pane. Where it refers to “Remote client type:” (towards the bottom), there may be a different reference then what is shown in the example. Continue to follow the steps, either way. Click Click here to change the selected client. This opens to a new page.

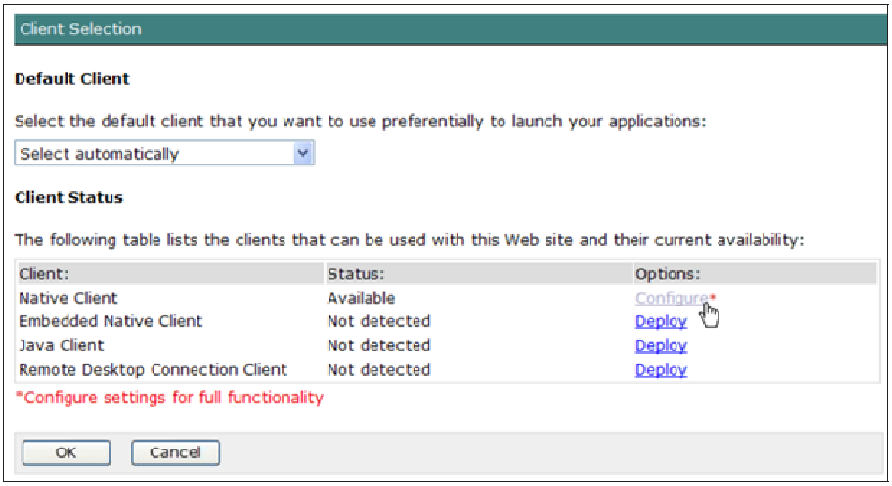
WARNING

If Citrix cannot be installed, please contact the IT department to obtain administrative permissions.

6) In the “Client Selection” portion of the page, there are 2 sub-sections: Default Client and Client Status. Default Client shouldn’t be bothered. In the Client Status section, there will be 3 clients: Native Client, Embedded Native Client, and Java Client. There may be more, but they aren’t important to this procedure. Following each client is its status and any options available. The status will either be “Available” or “Not detected.” Native Client* is the preferred choice. If the client is not detected, click “Deploy.” This will take open to a new page and the “Download” button will be available. Click that button to begin the install process for the Citrix client. Follow the prompts to “Run” and click accordingly. Once the download process has been completed, the Native Client may need to be configured.

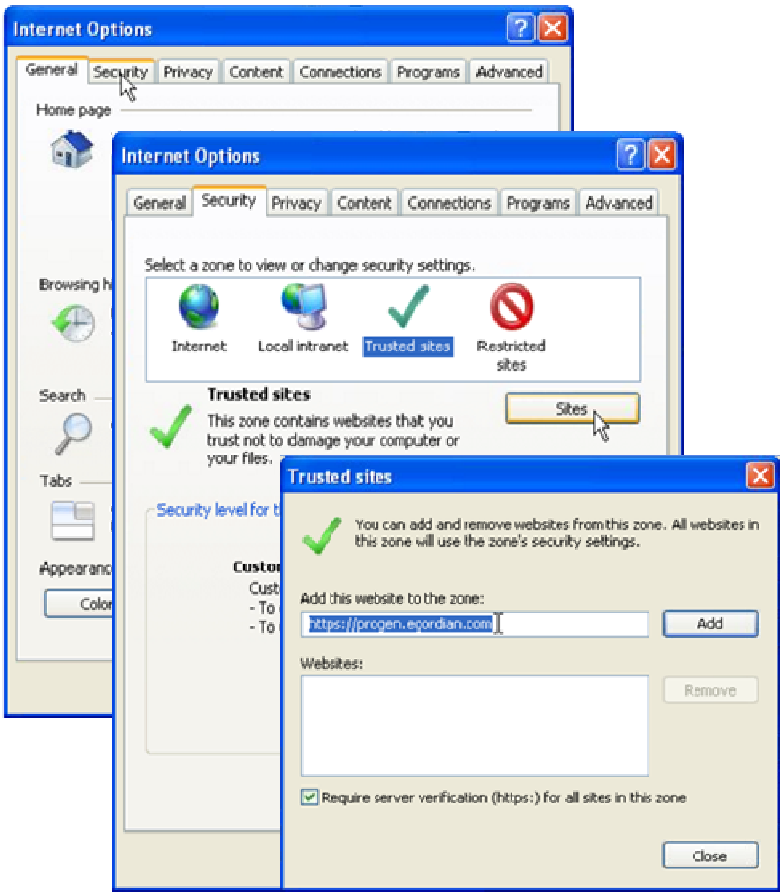
*Note: If the Java Client is the default client, deploying or configuring the Native Client will make it the default client.

After the download process has taken place, the next screen will show the client statuses and options. If the Native Client has a status of Available and an option of "-", then click "OK." If the Native client has an option of "Configure*" then click "Configure*" to complete the Native Client setup.


Client Selection
Default Client
Select the default client that you want to use preferentially to launch your applications:
Select automatically
Client Status
The following table lists the clients that can be used with this Web site and their current availability:
Client: | Status: | Options:
Native Client | Available | Configure*
Embedded Native Client | Not detected | Deploy
Java Client | Not detected | Deploy
Remote Desktop Connection Client | Not detected | Deploy
*Configure settings for full functionality
OK
Cancel

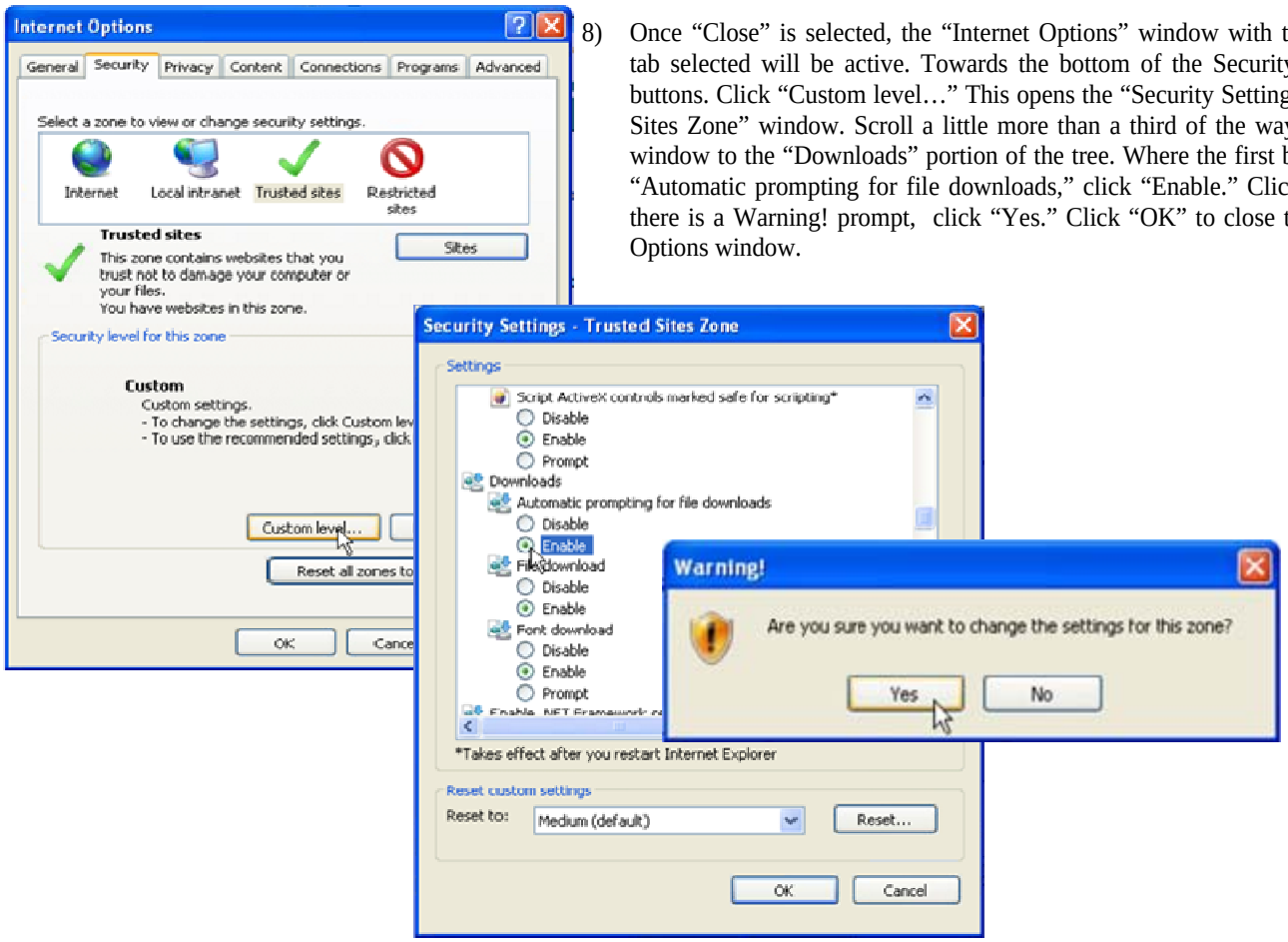
7) When "Configure*" is clicked, the page will redirect to another web page. This page will provide information on adding a web address to the Trusted Sites Zone. There is also a "Site Added" button. Do not click this button until the next few steps are followed:

In the Internet Explorer banner, click "Tools" and choose "Internet Options." The tools button is located on the right-hand side in the new IE7/8 and in its usual place on the left-hand side on all older explorers.

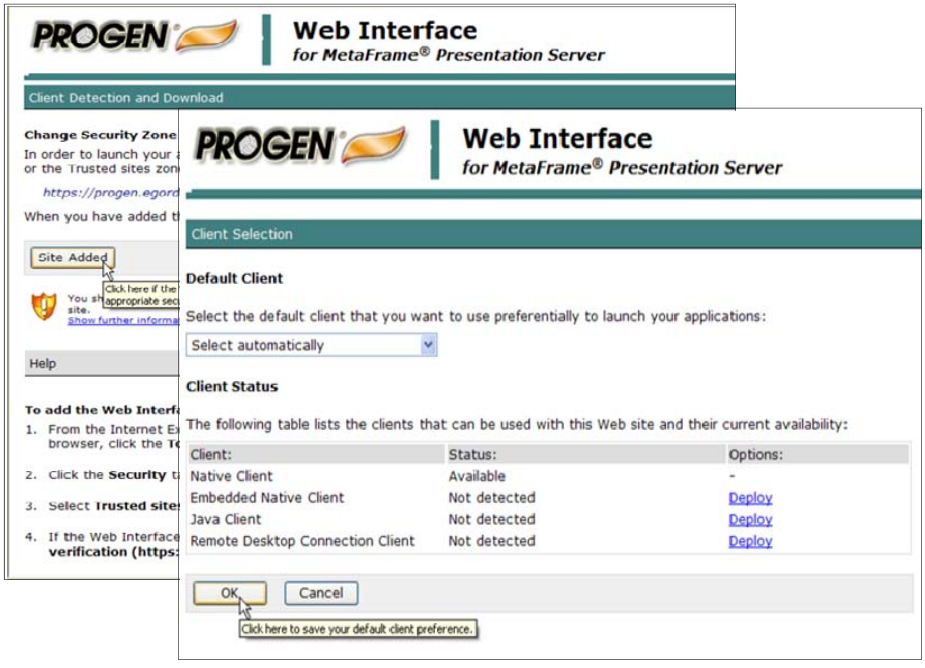


This opens the Internet Options window. Click the Security tab then click "Trusted Sites" (under a green check-mark) then click the "Sites" button. This will open the Trusted Sites window, allowing the addition of web URLs to the list of trusted web sites.

If the PROGEN web address isn't already in the "Add this website to the zone:" field, then type in https://progen.egordian.com. Click "Add." Uncheck the check box under the "Websites:" list. Type http://progen.egordian.com in the "Add this website…" field. Click "Add." Re-check the box. Click "Close."

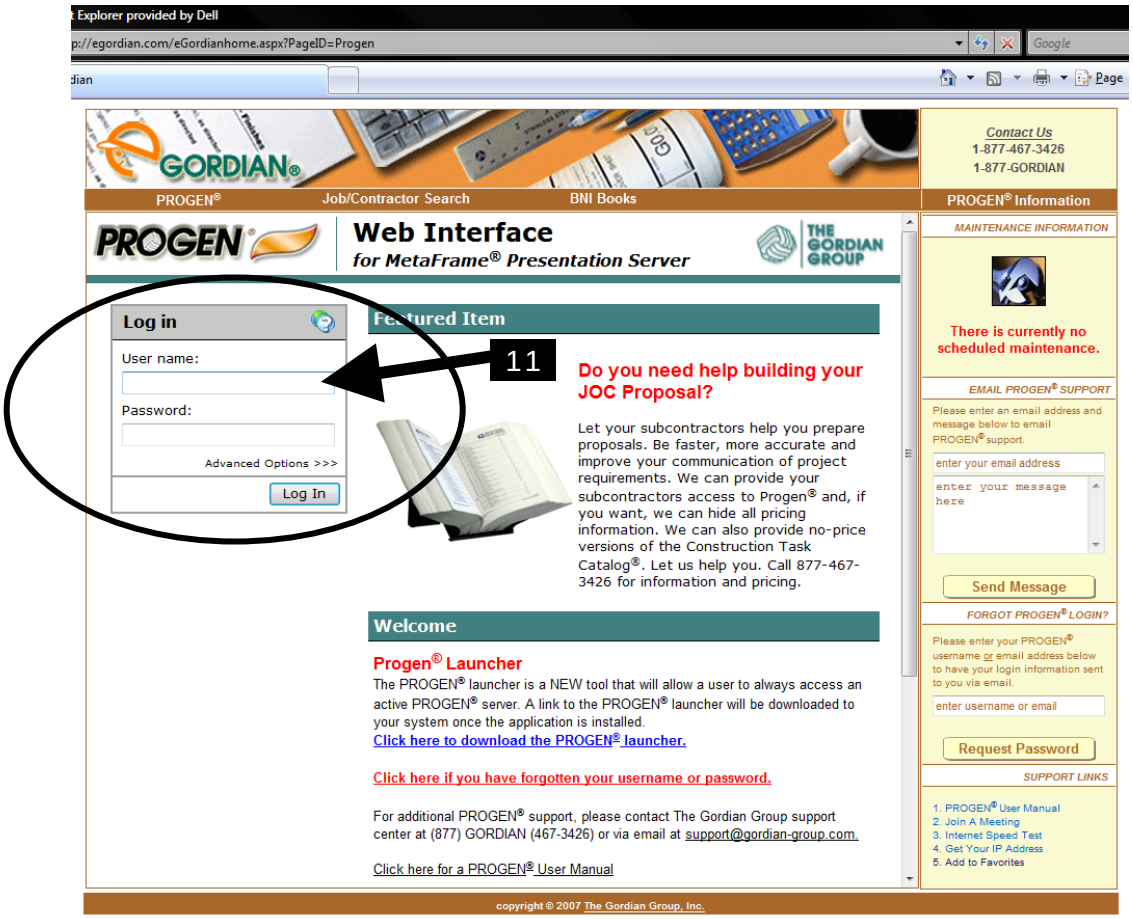


8) Once "Close" is selected, the "Internet Options" window with the security tab selected will be active. Towards the bottom of the Security tab are 3 buttons. Click "Custom level…" This opens the "Security Settings - Trusted Sites Zone" window. Scroll a little more than a third of the way down the window to the "Downloads" portion of the tree. Where the first branch says "Automatic prompting for file downloads," click "Enable." Click "OK." If there is a Warning! prompt, click "Yes." Click "OK" to close the Internet Options window.



9) Now click the "Site Added" button located above the orange and yellow shield on the middle left-hand side of the page then click "OK" found below the Client list.

10) Hide the advanced options by clicking "Advanced Options."


Explorer provided by Dell
p://egordian.com/eGordianhome.aspx?PageID=Progen
Google
Page
GORDIAN
PROGEN®
Job/Contractor Search
BNI Books
Contact Us
1-877-467-3426
1-877-GORDIAN
PROGEN® Information
PROGEN
Web Interface
for MetaFrame® Presentation Server
THE GORDIAN GROUP
Log in
User name:
Password:
Advanced Options >>>
Log In
11
Featured Item
Do you need help building your JOC Proposal?
Let your subcontractors help you prepare proposals. Be faster, more accurate and improve your communication of project requirements. We can provide your subcontractors access to Progen® and, if you want, we can hide all pricing information. We can also provide no-price versions of the Construction Task Catalog®. Let us help you. Call 877-467-3426 for information and pricing.
Welcome
Progen® Launcher
The PROGEN® launcher is a NEW tool that will allow a user to always access an active PROGEN® server. A link to the PROGEN® launcher will be downloaded to your system once the application is installed.
Click here to download the PROGEN® launcher.
Click here if you have forgotten your username or password.
For additional PROGEN® support, please contact The Gordian Group support center at (877) GORDIAN (467-3426) or via email at support@gordian-group.com.
Click here for a PROGEN® User Manual
MAINTENANCE INFORMATION
There is currently no scheduled maintenance.
EMAIL PROGEN® SUPPORT
Please enter an email address and message below to email PROGEN® support.
enter your email address
enter your message here
Send Message
FORGOT PROGEN® LOGIN?
Please enter your PROGEN® username or email address below to have your login information sent to you via email.
enter username or email
Request Password
SUPPORT LINKS
1. PROGEN® User Manual
2. Join A Meeting
3. Internet Speed Test
4. Get Your IP Address
5. Add to Favorites
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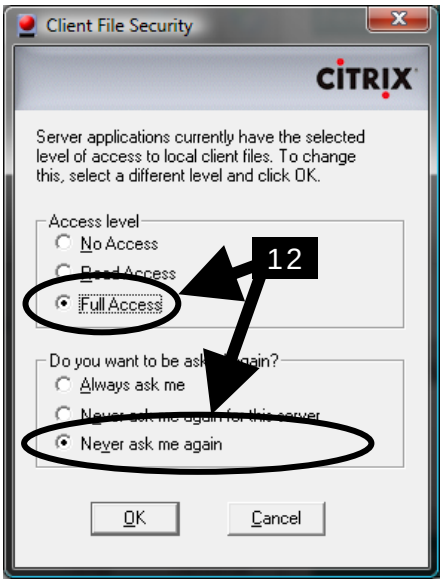
11) Enter the username and password then click the 'LOG IN' button.


Client File Security
CITRIX
Server applications currently have the selected level of access to local client files. To change this, select a different level and click OK.
Access level
No Access
Read Access
Full Access
12
Do you want to be asked again?
Always ask me
Never ask me again
OK
Cancel

✔ NOTE

The 'Client File Security' window will only open during the initial login to PROGEN per computer.

12) The 'CLIENT FILE SECURITY' window will open.
    a) Select 'FULL ACCESS'.
    b) Select 'NEVER ASK ME AGAIN'.
13) Click the 'OK' button and PROGEN will launch.

Change Username or Password

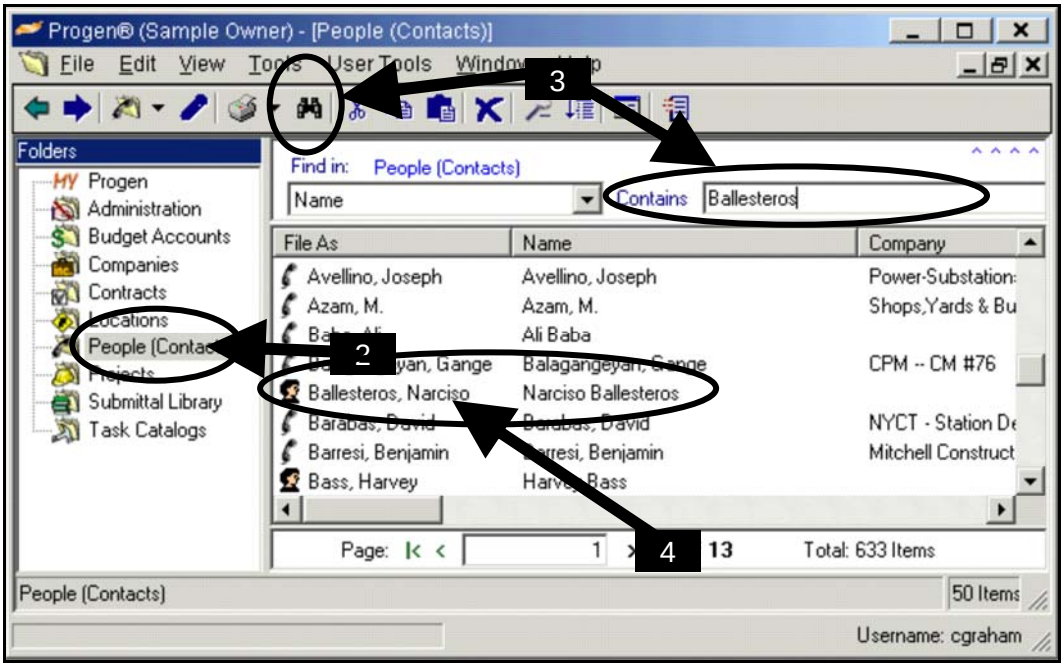
NOTE

On initial login, the user will be prompted to change his/her password.

1) To change Username or Password, launch PROGEN.

2) Select 'PEOPLE (CONTACTS)' on the 'TREEVIEW' panel to show the list of contacts.

3) Click on the binoculars within the button bar, to view the search panel above the list of names on the 'LISTVIEW' side. Enter the name into the 'CONTAINS' field, then click the 'FIND' button. Names that match the search entered will display the contacts on the 'LISTVIEW' side.



TIPS

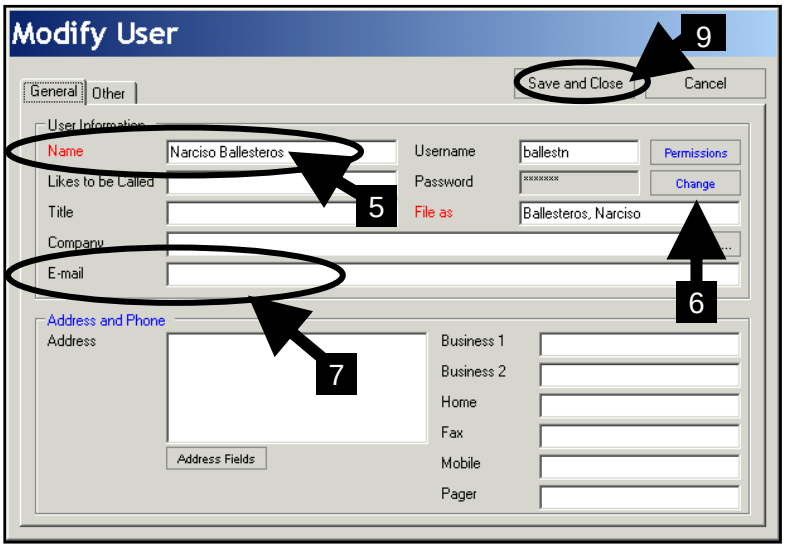
In order to use PROGEN e-mail, the user's e-mail address must be entered into PROGEN.

NOTE

Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.

4) Double click on the name and the 'MODIFY USER' window will open.

5) To modify contact information, click on any field and modify or add information. Always verify that the contact information is correct.

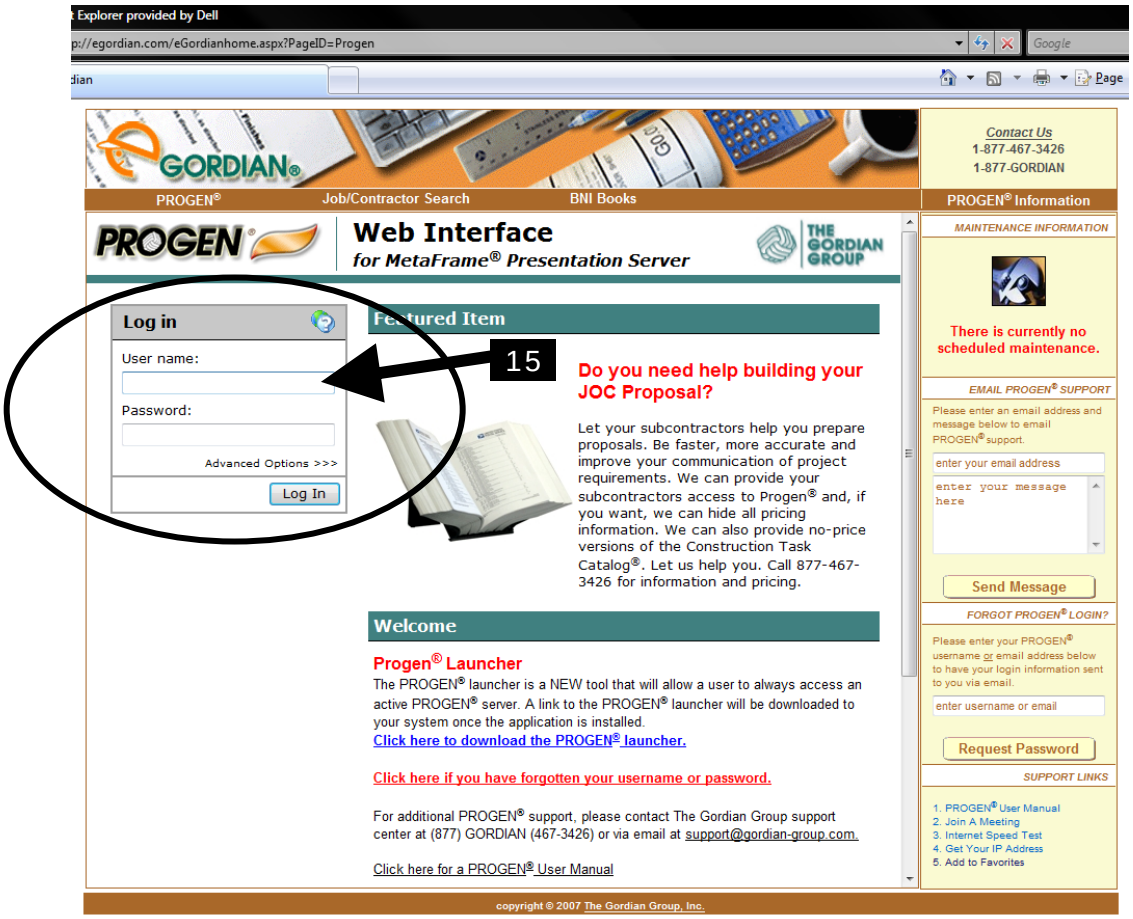


6) To change the 'PASSWORD', click the 'CHANGE' button.

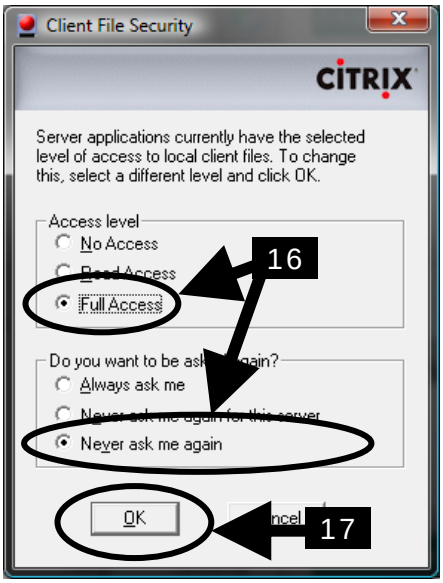
7) Enter the email address so reports and transmittals can be emailed.

8) Click on the 'ADDRESS AND PHONE' link to auto-fill the company information.

9) Click the 'SAVE AND CLOSE' button to save the changes.


Explorer provided by Dell
GORDIAN
PROGEN®
Job/Contractor Search
BNI Books
Contact Us
1-877-467-3426
1-877-GORDIAN
PROGEN® Information
PROGEN
Web Interface
for MetaFrame® Presentation Server
THE GORDIAN GROUP
Log in
User name:
Password:
Advanced Options >>>
Log In
15
Featured Item
Do you need help building your JOC Proposal?
Let your subcontractors help you prepare proposals. Be faster, more accurate and improve your communication of project requirements. We can provide your subcontractors access to Progen® and, if you want, we can hide all pricing information. We can also provide no-price versions of the Construction Task Catalog®. Let us help you. Call 877-467-3426 for information and pricing.
Welcome
Progen® Launcher
The PROGEN® launcher is a NEW tool that will allow a user to always access an active PROGEN® server. A link to the PROGEN® launcher will be downloaded to your system once the application is installed.
Click here to download the PROGEN® launcher.
Click here if you have forgotten your username or password.
For additional PROGEN® support, please contact The Gordian Group support center at (877) GORDIAN (467-3426) or via email at support@gordian-group.com.
Click here for a PROGEN® User Manual
MAINTENANCE INFORMATION
There is currently no scheduled maintenance.
EMAIL PROGEN® SUPPORT
Please enter an email address and message below to email PROGEN® support.
enter your email address
enter your message here
Send Message
FORGOT PROGEN® LOGIN?
Please enter your PROGEN® username or email address below to have your login information sent to you via email.
enter username or email
Request Password
SUPPORT LINKS
1. PROGEN® User Manual
2. Join A Meeting
3. Internet Speed Test
4. Get Your IP Address
5. Add to Favorites
copyright © 2007 The Gordian Group, Inc.

15) Enter a username and password then click the 'LOG IN' button.



> **NOTE**
>
> The 'Client File Security' window will only open during the initial login to PROGEN per computer.

16) The 'CLIENT FILE SECURITY' window will open.
    a) Select 'FULL ACCESS'.
    b) Select 'NEVER ASK ME AGAIN'.
17) Click the 'OK' button and PROGEN will launch.

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Chapter 2 – Login / Logout of PROGEN

Login to PROGEN

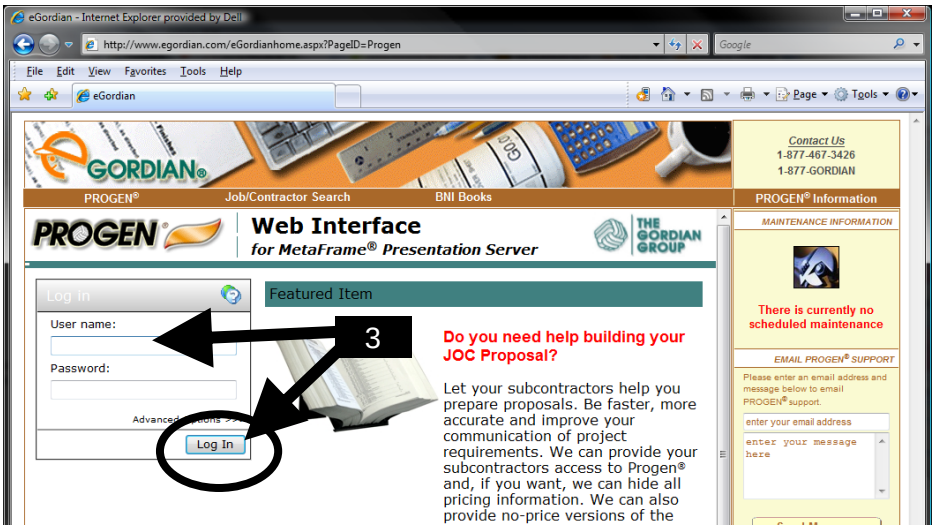
NOTE

If the user does not have a username or password, contact the PROGEN administrator or TGG representative.

1) Enter the following in the address bar of Internet Explorer: 'WWW.EGORDIAN.COM' and press 'ENTER' on the keyboard or click the 'GO' or Arrow button to the right of the URL with the mouse pointer.

2) Single Click on the PROGEN panel – this will open the PROGEN login screen within the eGordian® website.

3) Enter a username and password then click the 'LOG IN' button.

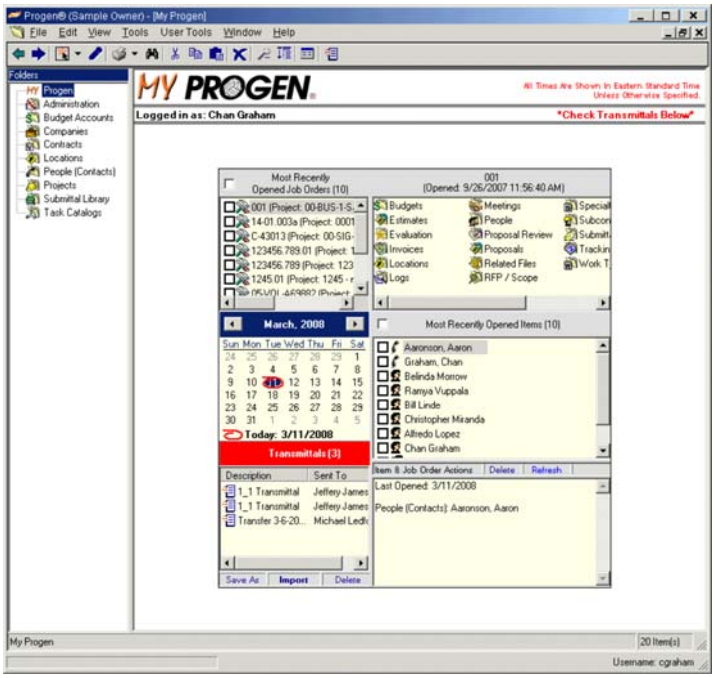

http://www.egordian.com/eGordianhome.aspx?PageID=Progen
3
PROGEN®
Job/Contractor Search
BNI Books
PROGEN® Information
Web Interface
for MetaFrame® Presentation Server
Log In
User name:
Password:
Log In
Featured Item
Do you need help building your JOC Proposal?
Let your subcontractors help you prepare proposals. Be faster, more accurate and improve your communication of project requirements. We can provide your subcontractors access to Progen® and, if you want, we can hide all pricing information. We can also provide no-price versions of the
Contact Us
1-877-467-3426
1-877-GORDIAN
MAINTENANCE INFORMATION
There is currently no scheduled maintenance
EMAIL PROGEN® SUPPORT

TIP - CONTRACTOR

The opening splash screen now has an option to 'SWITCH CONTRACTOR'. This option will be available to any user that can access more than one contractor.

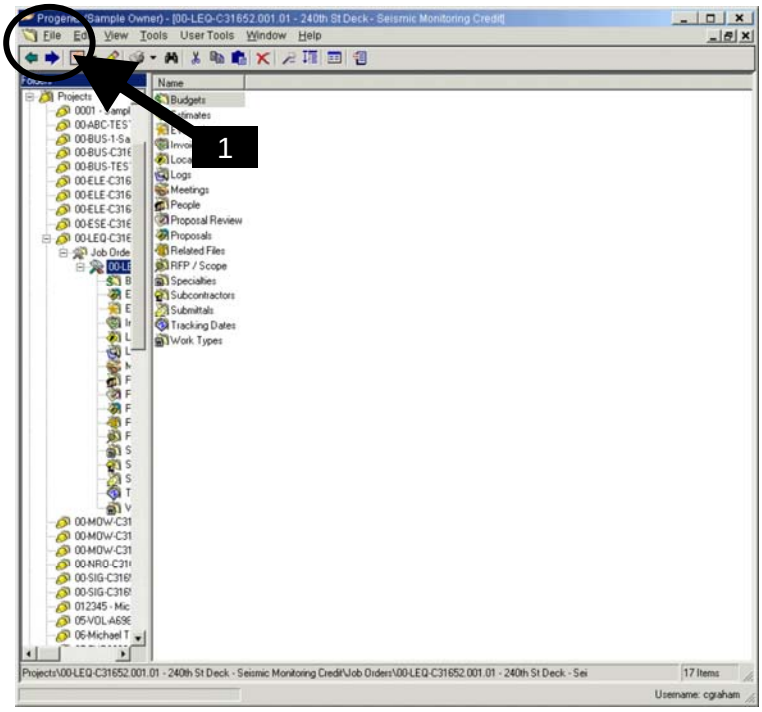
4) PROGEN should auto start. If it does not, click the icon to launch the PROGEN application.

5) The PROGEN application will open and look similar to the window below.



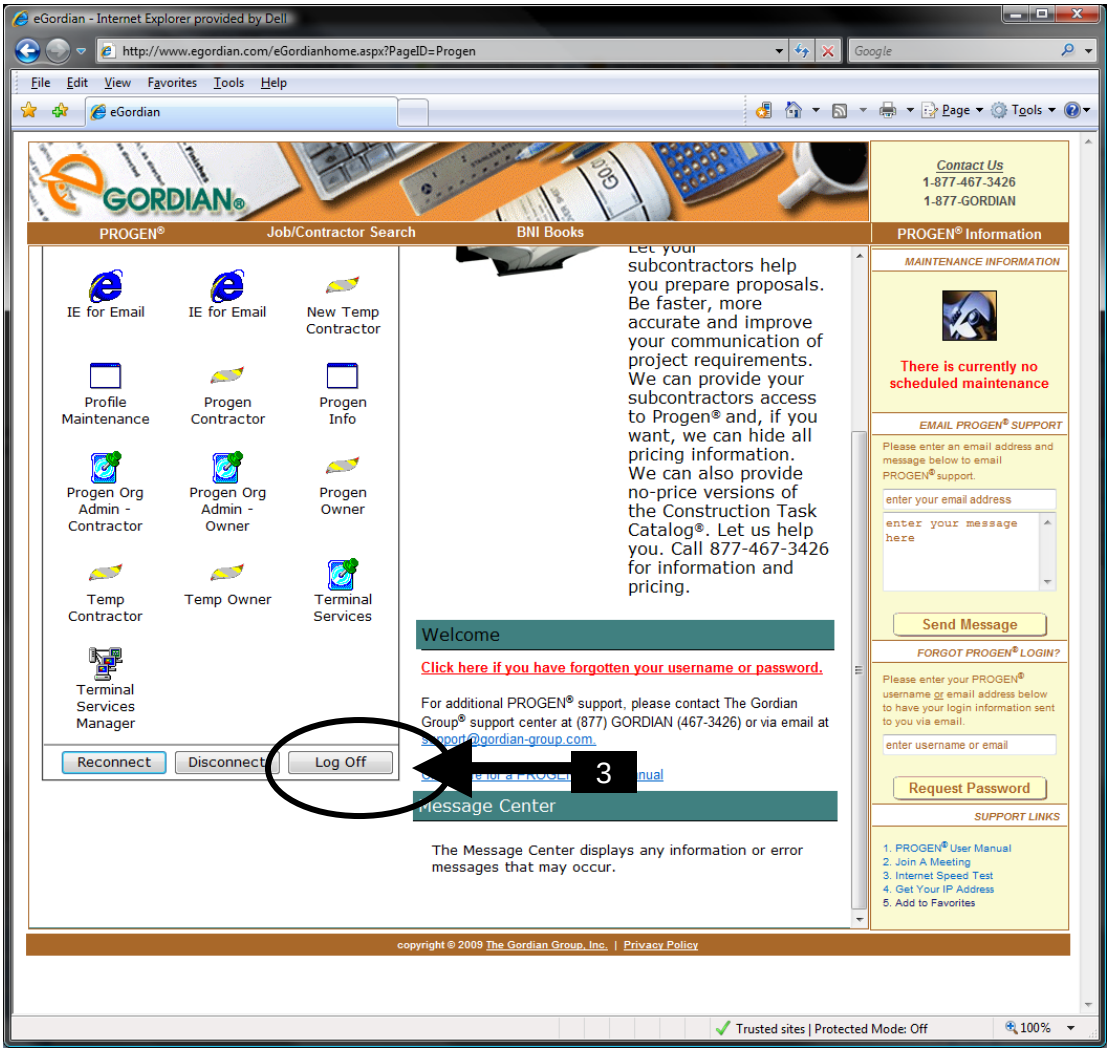
Log Out of PROGEN and Citrix

1) To avoid having to contact Customer Support for login help, we suggest following the procedures outlined for properly ending the program. To correctly logout of PROGEN, go to the FILE menu and select EXIT.



2) If the eGordian Web Page logs the user off, there is no need to continue with the next steps.

3) Select the LOG OFF button to exit PROGEN. The user has safely logged off of PROGEN. No one will be able to access the user's information and the user will be able to log on from another machine if necessary.


eGordian - Internet Explorer provided by Dell
http://www.egordian.com/eGordianhome.aspx?PageID=Progen
File Edit View Favorites Tools Help
eGordian
GORDIAN
Contact Us
1-877-467-3426
1-877-GORDIAN
PROGEN®
Job/Contractor Search
BNI Books
PROGEN® Information
IE for Email
IE for Email
New Temp Contractor
Profile Maintenance
Progen Contractor
Progen Info
Progen Org Admin - Contractor
Progen Org Admin - Owner
Progen Owner
Temp Contractor
Temp Owner
Terminal Services
Terminal Services Manager
Reconnect
Disconnect
Log Off
3
subcontractors help you prepare proposals. Be faster, more accurate and improve your communication of project requirements. We can provide your subcontractors access to Progen® and, if you want, we can hide all pricing information. We can also provide no-price versions of the Construction Task Catalog®. Let us help you. Call 877-467-3426 for information and pricing.
Welcome
Click here if you have forgotten your username or password.
For additional PROGEN® support, please contact The Gordian Group® support center at (877) GORDIAN (467-3426) or via email at
Message Center
The Message Center displays any information or error messages that may occur.
MAINTENANCE INFORMATION
There is currently no scheduled maintenance
EMAIL PROGEN® SUPPORT
Please enter an email address and message below to email PROGEN® support.
enter your email address
enter your message here
Send Message
FORGOT PROGEN® LOGIN?
Please enter your PROGEN® username or email address below to have your login information sent to you via email.
enter username or email
Request Password
SUPPORT LINKS
1. PROGEN® User Manual
2. Join A Meeting
3. Internet Speed Test
4. Get Your IP Address
5. Add to Favorites
copyright © 2009 The Gordian Group, Inc. | Privacy Policy
Trusted sites | Protected Mode: Off
100%

Forgotten Username or Password

1) Enter the following in the address bar of Internet Explorer: 'WWW.EGORDIAN.COM' and press 'ENTER' on the keyboard or click the 'GO' or Arrow button to the right of the URL with the mouse pointer.

2) Click in the field to the right of the screen, in the gold panel, that contains the phrase "enter username or email."*

3) Enter a username or email address then click the 'REQUEST PASSWORD' button. An email containing the username and password will be sent to the user's email address.

*An alternate way to get the username and/or password is by clicking "Click here if you have forgotten your username or password" on the PROGEN login screen.

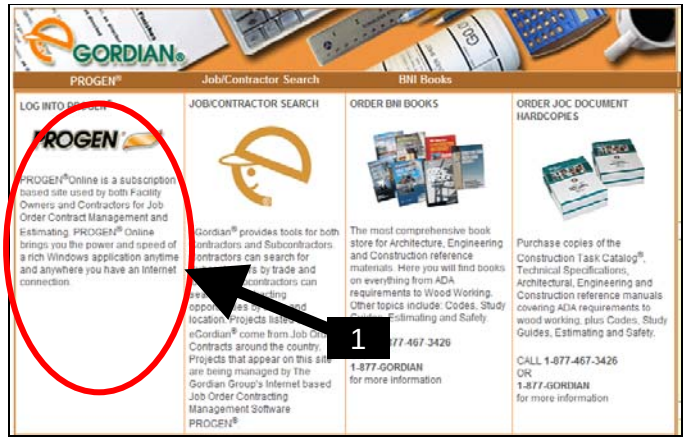
1) On the eGordian web page, click the PROGEN pane.

NOTE

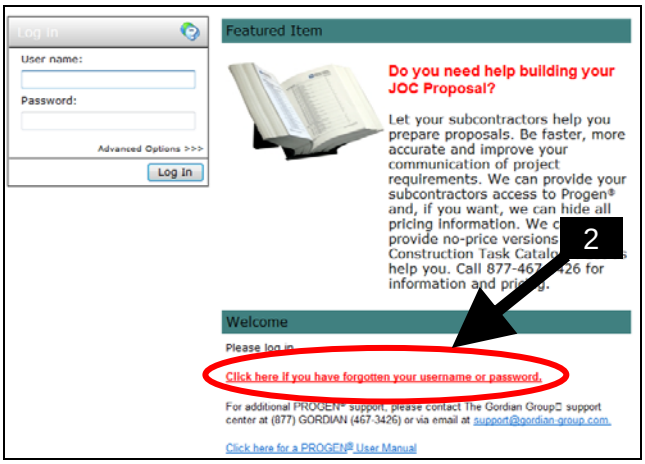
If the user does not have a username or password, contact the PROGEN administrator or TGG representative.

NOTE

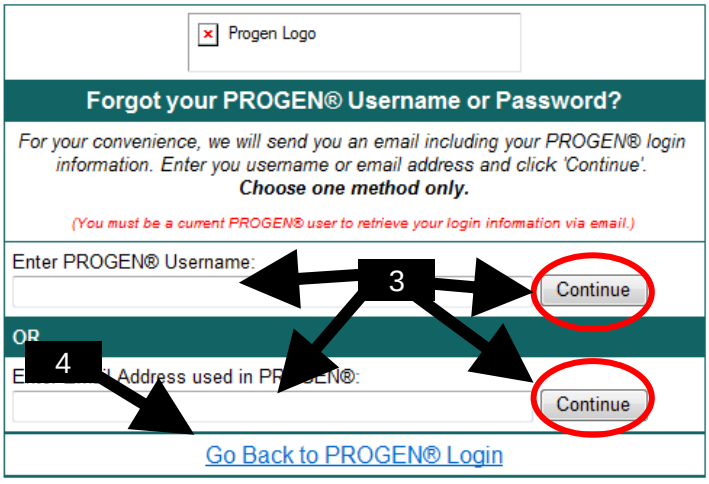
If the user does not have an email address in PROGEN, contact the PROGEN administrator or TGG representative. The username/password tool will not work if the user has no email address in PROGEN.



2) In the WELCOME section of the page, click **Click here if you have forgotten your username or password.**


Log In
User name:
Password:
Advanced Options >>>
Log In
Featured Item
Do you need help building your JOC Proposal?
Let your subcontractors help you prepare proposals. Be faster, more accurate and improve your communication of project requirements. We can provide your subcontractors access to Progen® and, if you want, we can hide all pricing information. We c
provide no-price versions
Construction Task Catal
help you. Call 877-467-
information and pri
2
Welcome
Please log in
Click here if you have forgotten your username or password.
For additional PROGEN® support, please contact The Gordian Group support center at (877) GORDIAN (467-3426) or via email at support@gordian-group.com.
Click here for a PROGEN® User Manual

3) Enter the PROGEN username or the email address used in PROGEN in the appropriate field then click "Continue."


Progen Logo
Forgot your PROGEN® Username or Password?
For your convenience, we will send you an email including your PROGEN® login information. Enter you username or email address and click 'Continue'.
Choose one method only.
(You must be a current PROGEN® user to retrieve your login information via email.)
Enter PROGEN® Username:
3
Continue
OR
4
Address used in PR EN®:
Continue
Go Back to PROGEN® Login

4) Click Go Back to PROGEN® Login

5) The page will go back to the PROGEN login page. An email containing the username and password will be sent to the user's email address.

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Chapter 3 – PROGEN Window Layout

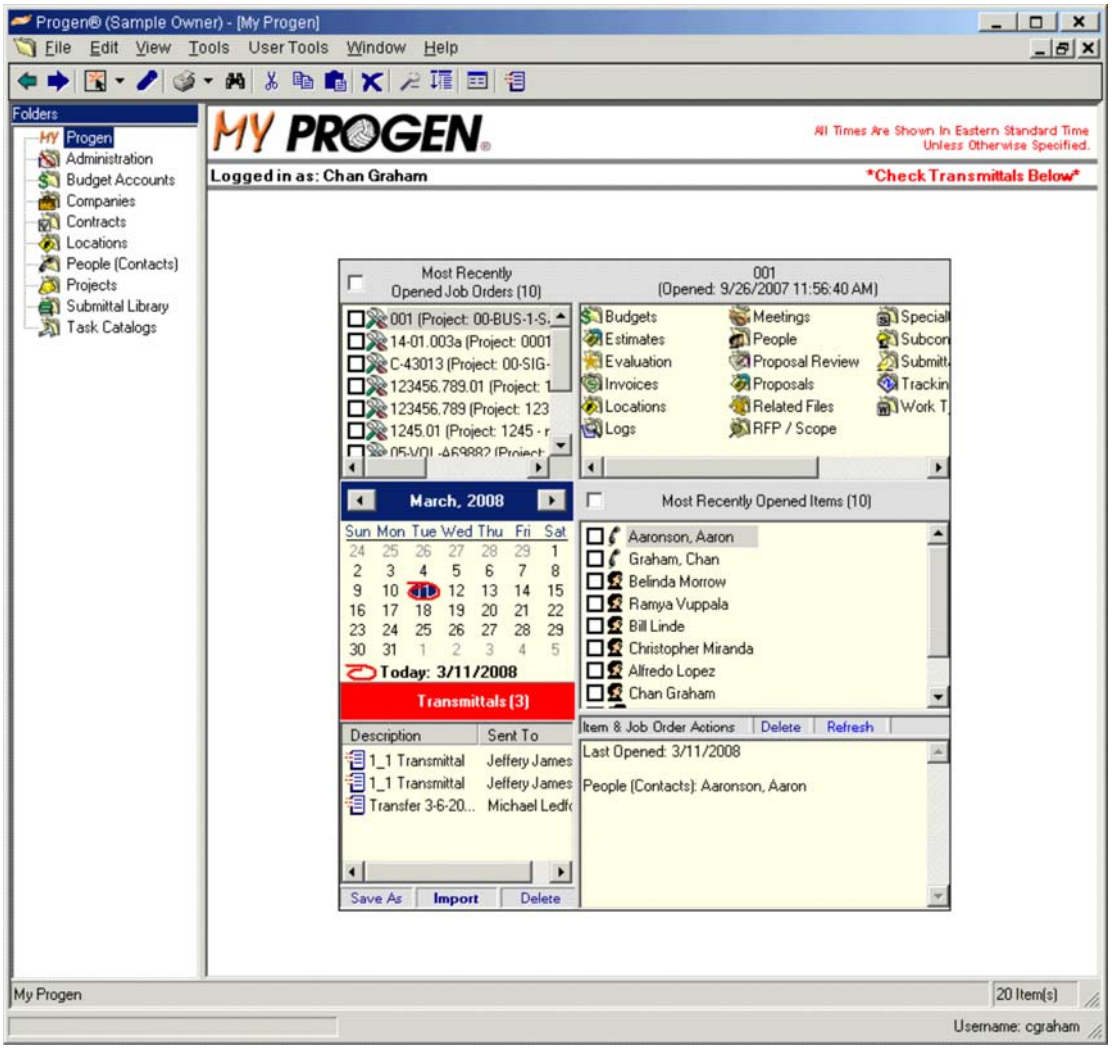
Many of the commands, keyboard shortcuts, menus, and file management hierarchy shown within PROGEN are the same as within Windows Explorer. This makes it easier to navigate in PROGEN. In addition, ALL of the PROGEN items listed in the 'TREEVIEW' (shown below) use the same commands for navigating. Usually, there will be several ways of navigating through different functions of PROGEN. Displayed below are the most common techniques used.

✓ NOTE

See PART 1 for information on launching and logging on to PROGEN.

The PROGEN Explorer Window

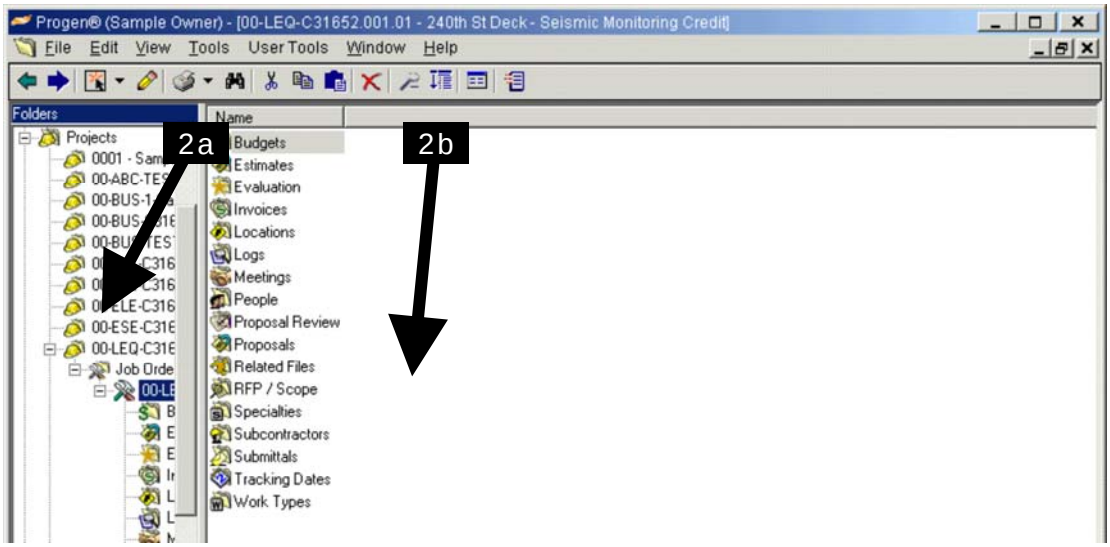
1) PROGEN opens to the MY PROGEN window. This window is very useful as a shortcut to the MOST RECENTLY OPENED JOB ORDERS. It saves from time of drilling down through the menus. By clicking one of the items in the MY PROGEN window or selecting from the folders on the left side of the window, the user can drill down to the job needed.



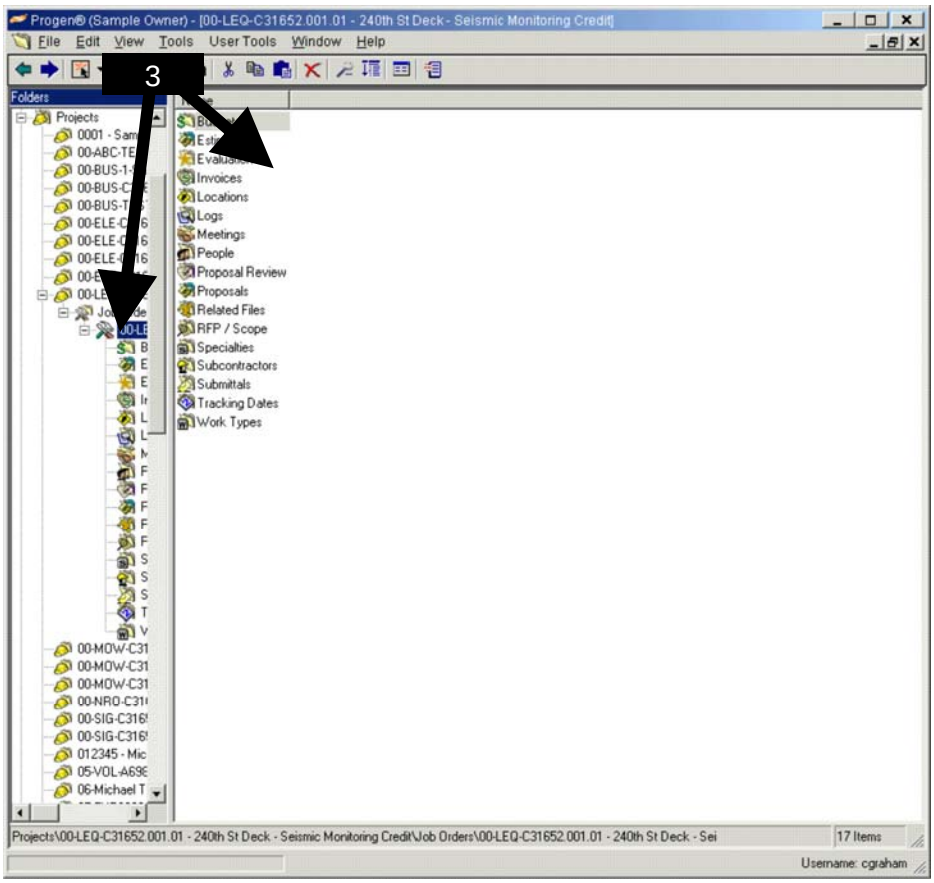
2) The typical PROGEN window shows what the PROGEN explorer looks like.

a) The panel on the left is the 'TREEVIEW'.

b) The panel on the right contains the 'LISTVIEW' or 'DETAILS'. The folder icon selected on the 'TREEVIEW' side will display the details contained within it on the 'LISTVIEW' side of the window.



3) Double click to expand the 'TREEVIEW' folder icons or to drill down on the 'LISTVIEW' side, just as in Windows Explorer.



✓ NOTE

For Users whose mouse has been reconfigured for left-hand use, the typical mouse click will be the right mouse button. Likewise, RIGHT CLICK will now be LEFT CLICK.

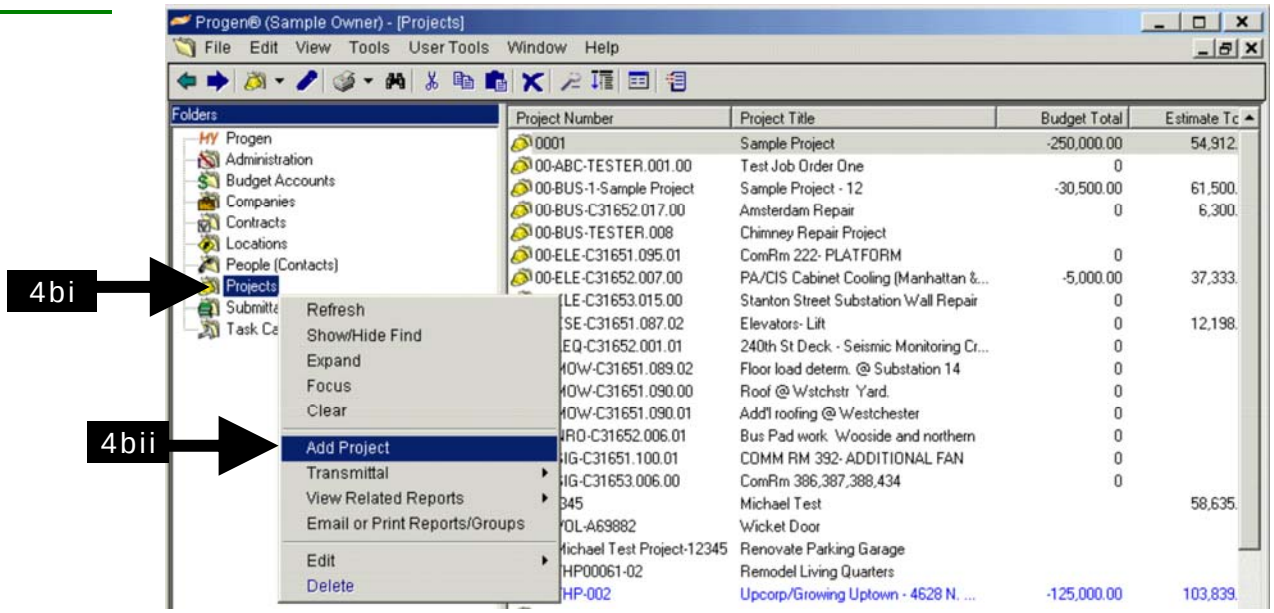
4) Some of the basic computer skills needed to open and manage files and windows are:

   a) CLICK or DOUBLE CLICK – To do this, depress and release the left mouse button once or twice while having the mouse screen pointer located over the folder or file to be selected.

   b) RIGHT CLICK –

      i) Depress and release the right mouse button while having the mouse screen pointer located over the item, activating a drop down menu.

      ii) Click the left mouse button to select an item from the drop down menu.



Drag and Drop information

1) A convenient feature of PROGEN is the 'DRAG AND DROP' feature. The advantage of this feature is that information already entered can easily be copied into another folder. One difference between the 'DRAG AND DROP' in PROGEN and the 'DRAG AND DROP' in Windows Explorer is that PROGEN copies information from one folder to another folder and **never** moves it out of the current folder. It is best used to:

   a) Copy LOCATIONS at the top level to the LOCATIONS folder in any JOB ORDER and copy LOCATIONS from one JOB ORDER to another.

   b) Copy CONTACTS at the top level to the PEOPLE folder in any JOB ORDER and copy PEOPLE from one JOB ORDER to another.

   c) Copy COMPANIES at the top level to the SUBCONTRACTORS folder in any JOB ORDER and copy SUBCONTRACTORS from one JOB ORDER to another.

   d) Copy BUDGET ACCOUNTS at the top level to the BUDGETS folder in any JOB ORDER and copy BUDGET ACCOUNTS from one JOB ORDER to another.

   e) Copy CONSTRUCTION TASKS from the TASK CATALOG to the PROPOSAL DETAILS folder in any JOB ORDER.

   f) Copy a JOB ORDER from one PROJECT folder to any other PROJECT.

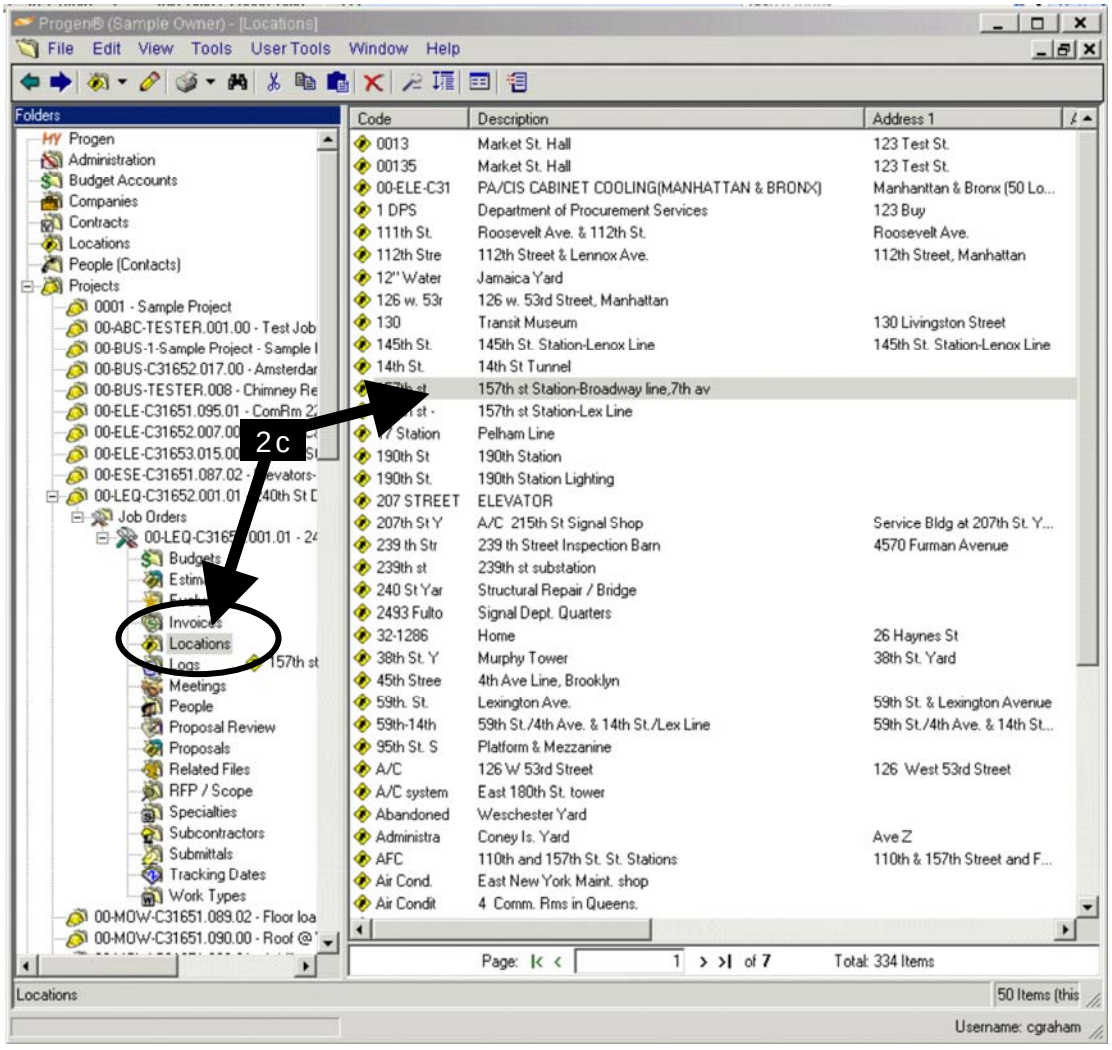
   g) Copy a PROPOSAL or ESTIMATE from one JOB ORDER folder to any other JOB ORDER.

2) To be able to 'DRAG AND DROP' an item, the current location of the item in the 'LISTVIEW' panel must be viewed and the folder of the new location of the item must be expanded on the 'TREEVIEW' panel. In this example a LOCATION is copied from LOCATIONS at the top level to a JOB ORDER.

   a) Single click on any folder at the top level (e.g. LOCATION) on the 'TREEVIEW' side. This shows a listing of all items entered into PROGEN on the 'LISTVIEW' side.

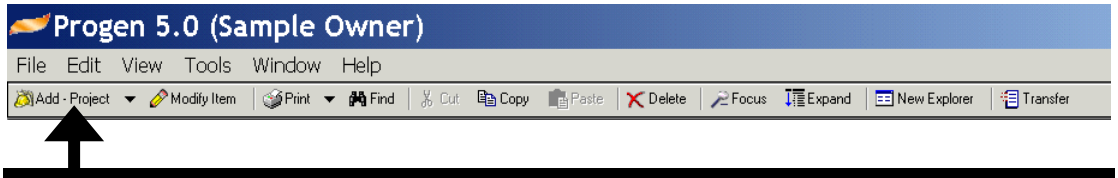
   b) On the 'LISTVIEW' side, click and hold the left mouse button on the desired item.

   c) While holding the mouse button, DRAG the selected item to the corresponding folder (LOCATIONS) within the JOB ORDER. When the folder is highlighted, release the mouse button and the information will be copied. The information (LOCATIONS) is now associated with that JOB ORDER.


Progen® (Sample Owner) - [Locations]
File Edit View Tools User Tools Window Help
Folders
Progen
Administration
Budget Accounts
Companies
Contracts
Locations
People (Contacts)
Projects
Job Orders
Budgets
Invoices
Locations
Logs
Meetings
People
Proposal Review
Proposals
Related Files
RFP / Scope
Specialties
Subcontractors
Submittals
Tracking Dates
Work Types
2c
Code
Description
Address 1
0013 Market St. Hall 123 Test St.
00135 Market St. Hall 123 Test St.
00-ELE-C31 PA/CIS CABINET COOLING(MANHATTAN & BRONX) Manhanttan & Bronx (50 Lo...
1 DPS Department of Procurement Services 123 Buy
111th St. Roosevelt Ave. & 112th St. Roosevelt Ave.
112th Stre 112th Street & Lennox Ave. 112th Street, Manhattan
12" Water Jamaica Yard
126 w. 53r 126 w. 53rd Street, Manhattan
130 Transit Museum 130 Livingston Street
145th St. 145th St. Station-Lenox Line 145th St. Station-Lenox Line
14th St. 14th St Tunnel
157th st Station-Broadway line,7th av
157th st Station-Lex Line
Pelham Line
190th St 190th Station
190th St. 190th Station Lighting
207 STREET ELEVATOR
207th St Y A/C 215th St Signal Shop Service Bldg at 207th St. Y...
239 th Str 239 th Street Inspection Barn 4570 Furman Avenue
239th st 239th st substation
240 St Yar Structural Repair / Bridge
2493 Fulto Signal Dept. Quarters
32-1286 Home 26 Haynes St
38th St. Y Murphy Tower 38th St. Yard
45th Stree 4th Ave Line, Brooklyn
59th. St. Lexington Ave. 59th St. & Lexington Avenue
59th-14th 59th St./4th Ave. & 14th St./Lex Line 59th St./4th Ave. & 14th St...
95th St. S Platform & Mezzanine
A/C 126 W 53rd Street 126 West 53rd Street
A/C system East 180th St. tower
Abandoned Weschester Yard
Administra Coney Is. Yard Ave Z
AFC 110th and 157th St. St. Stations 110th & 157th Street and F...
Air Cond. East New York Maint. shop
Air Condit 4 Comm. Rms in Queens.
Page: 1 of 7 Total: 334 Items
Locations
50 Items (this
Username: cgraham

The PROGEN Toolbar

1) The 'TOOLBAR' located at the top of the PROGEN window can be a very useful device for quick operations or menu searching. Outlined below are some of the basic functions and uses.



Toolbar Actions

✓ NOTE

Most of these buttons are typical Windows commands that are available in most Windows-based applications.

ADD – This button changes depending on the item selected in the 'TREEVIEW'. It will ADD information to the item selected in the 'TREEVIEW' panel. EXAMPLE: If 'PROJECT' is selected on the 'TREEVIEW' panel, click the 'ADD PROJECT' button to open an 'ADD PROJECT' window and enter information for a new Project.
MODIFY – It will open the MODIFY screen for the selected item in the 'TREEVIEW' panel. EXAMPLE: If 'PROJECT' is selected on the 'TREEVIEW' panel, click the 'MODIFY PROJECT' button to open a 'MODIFY PROJECT' window and update the information for the Project.
PRINT – This button, when selected, will print a report ONLY while the report is being previewed.
FIND – This button will display a small panel at the top of the 'LISTVIEW'. Input appropriate search criteria and PROGEN will search for that item within the selected 'TREVIEW' folder.
CUT – This button deletes an item or text selected within a text field and saves it to the clipboard.
COPY – This button copies an item or text from a text field to the clipboard.
PASTE –This button will paste information that has been cut or copied from a text field.
DELETE – This button will delete information that has been selected.
FOCUS / FULL TREE – Select a folder in the 'TREEVIEW' and click the 'FOCUS' button to show only that item on the 'TREEVIEW' panel. The button then changes to 'FULL TREE' and when selected, will expand the 'TREEVIEW' panel again.
EXPAND / COLLAPSE – This button will expand or collapse a folder selected in the 'TREEVIEW'.
NEW EXPLORER – Select this button to open an additional Explorer window within PROGEN.
TRANSFER – Use this button to transfer data to the owner.

PROGEN Main Screen – Page, Number of Pages, and Items

1) The bottom of the PROGEN main screen on the 'LISTVIEW' panel shows information about the number of items listed. This is helpful when there are more than 50 items in the 'LISTVIEW' panel.

a) Shows the current page.

b) Shows the total number of pages for this component (when there is more than one page).

c) Shows the total number of items listed for this component.

d) Shows the number of items listed on this page (default maximum of 50 items).

✓ NOTE

By default, PROGEN will only display 50 items per page within the 'LISTVIEW'.

TECHNICAL

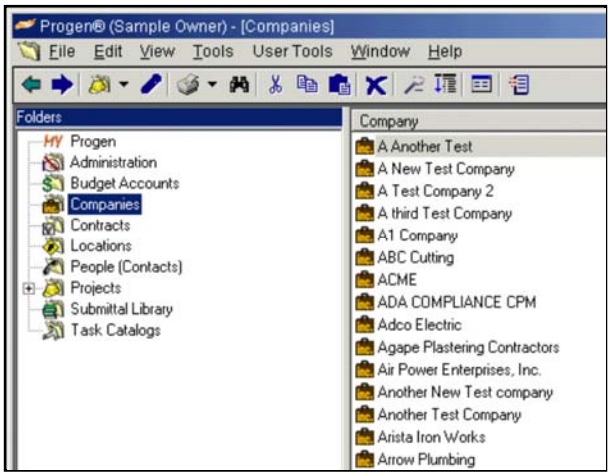
An Administrator can change the number of items in the 'LISTVIEW' by changing the Maximum Listview Display Count policy. (Not Common)

Part II – Essential Duties

Chapter 4 – Add, Edit, Delete Top-Level Data

Companies – Adding, Editing and Deleting

1) PROGEN stores all information related to companies in one location. Companies listed could include: subcontractors, suppliers, manufacturers, or departments within the facility owner or contractor's organizations.



2) From 'COMPANIES' on the top level of the 'TREEVIEW', information can be added, edited or deleted.

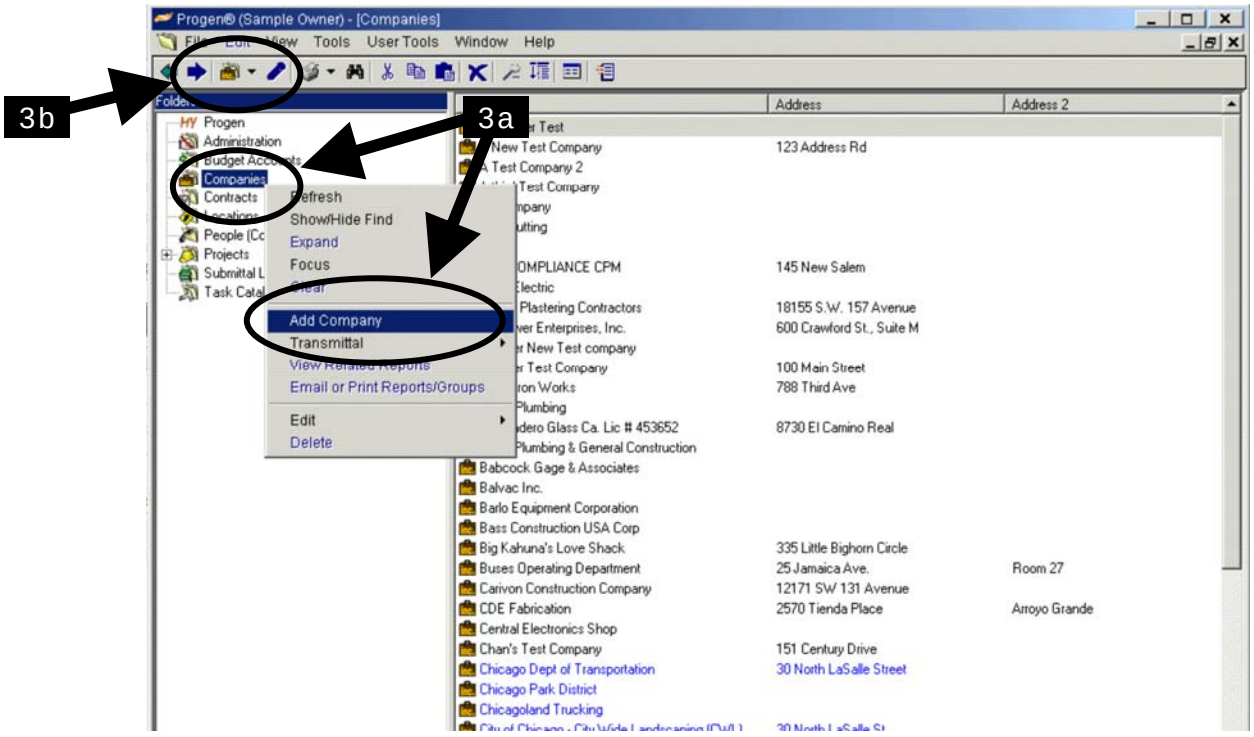
3) To add a company, either:

   a) Right click on 'COMPANIES' to show a drop down menu, then select 'ADD COMPANY' to open the Company window.

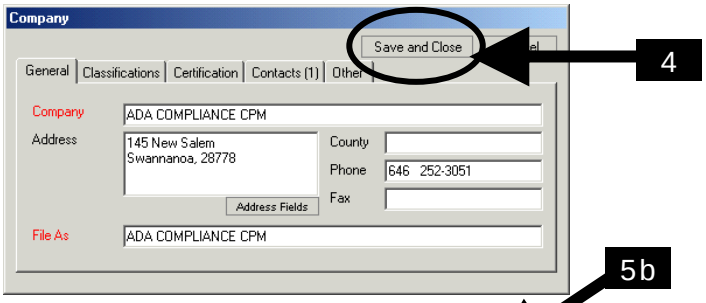
   b) With 'COMPANIES' selected click on 'ADD COMPANY' in the tool bar.

RIGHT CLICK

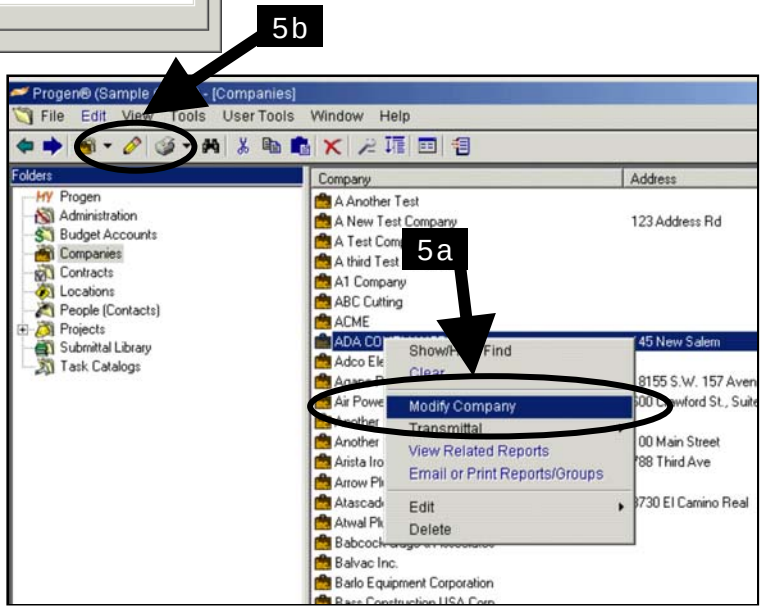
Right clicking on Companies in the 'TREEVIEW' brings up a drop down menu with multiple selections.



4) Enter the information for this new company, and then click ‘SAVE AND CLOSE’.



5) To edit a company, select a company to be edited then either:



   a) Right click on the selected company on the ‘LISTVIEW’ panel and select ‘MODIFY COMPANY’ from the drop down menu to open the Company window.

   b) Click the ‘MODIFY ITEM’ button on the button bar.

6) Edit the information for this company and click ‘SAVE AND CLOSE’ when finished.

7) To delete a company, select a company to be removed, then either:

   a) Click the Delete button on the toolbar

   b) Press delete on the keyboard

   c) RIGHT CLICK the company and select delete from the menu

PEOPLE (CONTACTS) – Adding, Editing and Deleting

1) PROGEN stores all the CONTACT information in one location. ‘PEOPLE (CONTACTS)’ is found at the top level of the ‘TREEVIEW’.

2) From ‘PEOPLE (CONTACTS)’ on the top level of the ‘TREEVIEW’, information can be added, edited or deleted.

3) To add a contact, either:

   a) Right click on ‘PEOPLE (CONTACTS)’ to show a drop down menu, then select ‘ADD CONTACT’ to open the Contract window.

   b) Click the ‘ADD CONTACT’ button on the button bar

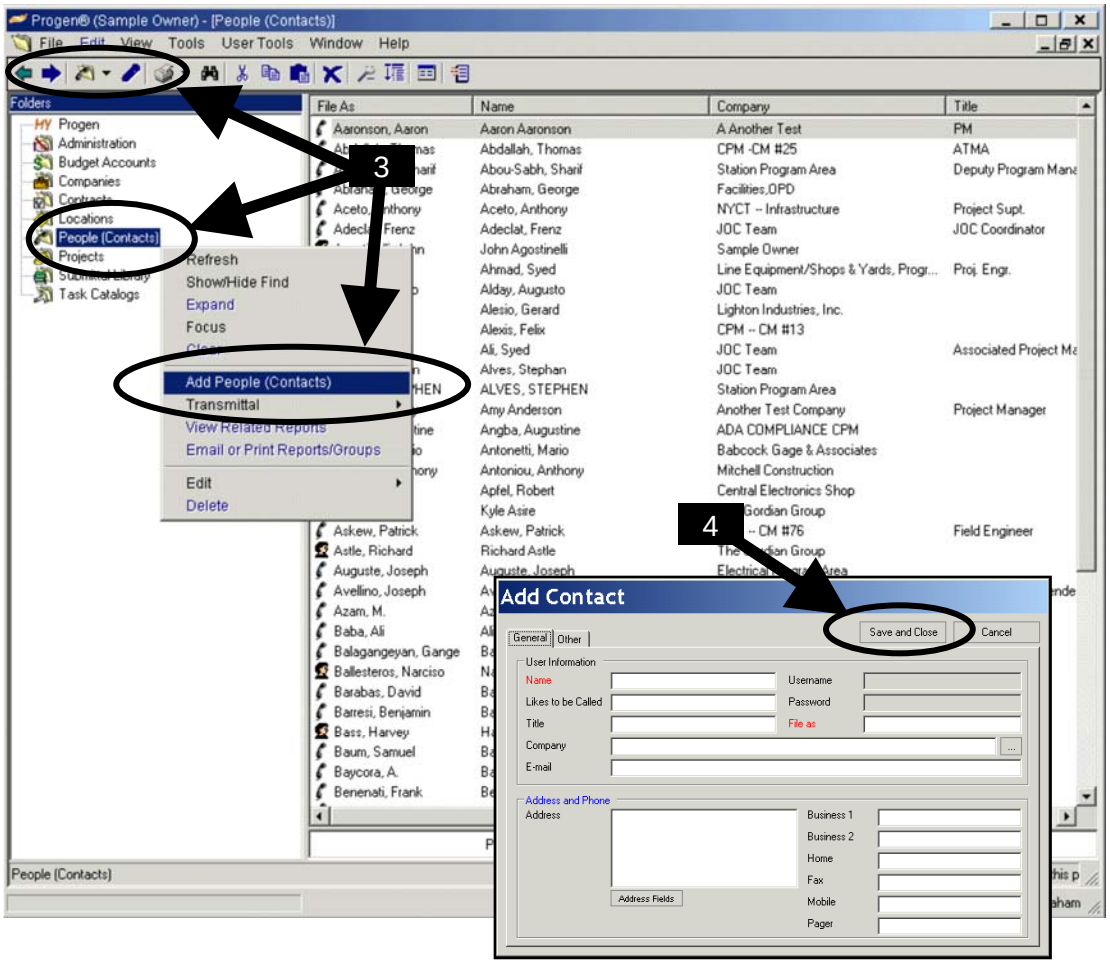
4) Enter the information for this new contact, and then click ‘SAVE AND CLOSE’.

✔ NOTE

The user must CLICK on the 'Save and Close' button to save the changes made.

✔ NOTE

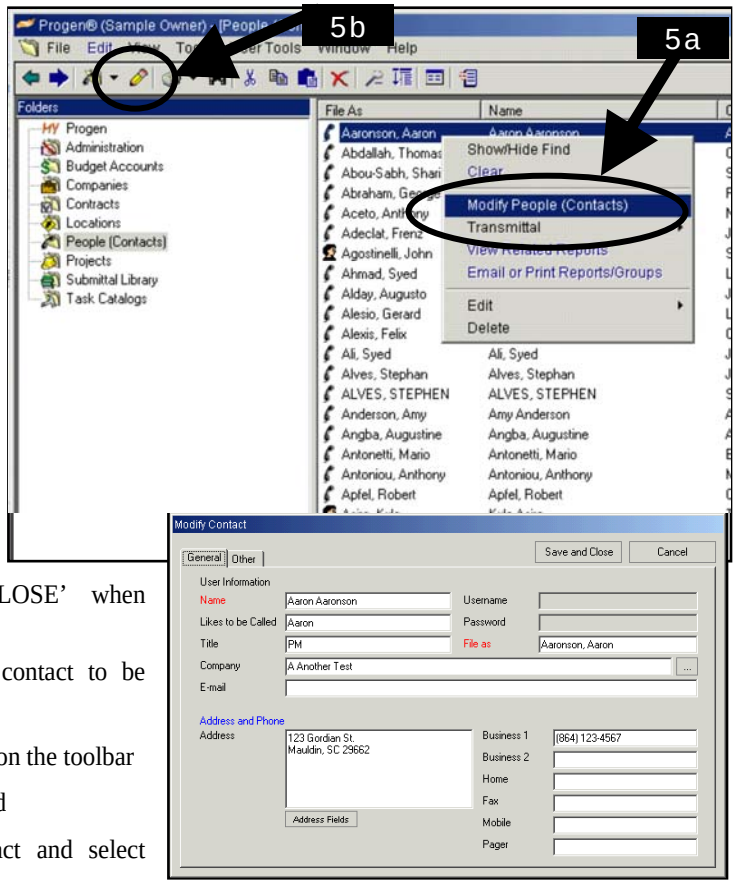
Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.



5) To edit a contact select a contact to be edited then either:

   a) Right click on the selected contact on the 'LISTVIEW' panel and select 'MODIFY PEOPLE (CONTACTS)' from the drop down menu to open the Modify Contact window

   b) Click the 'MODIFY ITEM' button on the button bar



6) This will open the Modify Contact window. Edit the information for this contact and click 'SAVE AND CLOSE' when finished.

7) To delete a contact, select a contact to be removed, then either:

   a) Click the ✕ Delete button on the toolbar

   b) Click delete on the keyboard

   c) RIGHT CLICK the contact and select delete from the menu.

Locations – Adding, Editing and Deleting

1) PROGEN stores all the different facility location information in one place. 'LOCATIONS' is found at the top level of the 'TREEVIEW'.

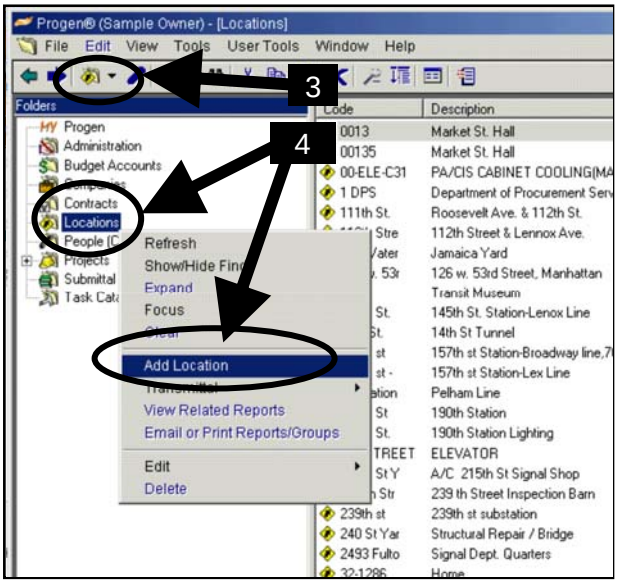
2) From 'LOCATIONS' on the top level of the 'TREEVIEW', facility location information can be added, edited or deleted.

3) To add a location, click on 'ADD LOCATIONS' button in the toolbar OR.

4) Right click on 'LOCATIONS' to show a drop down menu. Select 'ADD LOCATION' to open the Add Location window. Enter the information for this new location.

5) To edit a 'LOCATION', RIGHT CLICK on the selected location on the 'LISTVIEW' panel and select 'MODIFY LOCATION' from the drop down menu.

6) This will open the 'LOCATIONS' window. Edit the information for this location.



7) To delete a 'LOCATION', CLICK on a location to highlight it.
   a. CLICK the 'delete' button on the toolbar
   b. Click delete on the keyboard
   c. RIGHT CLICK the location and select delete from the menu.

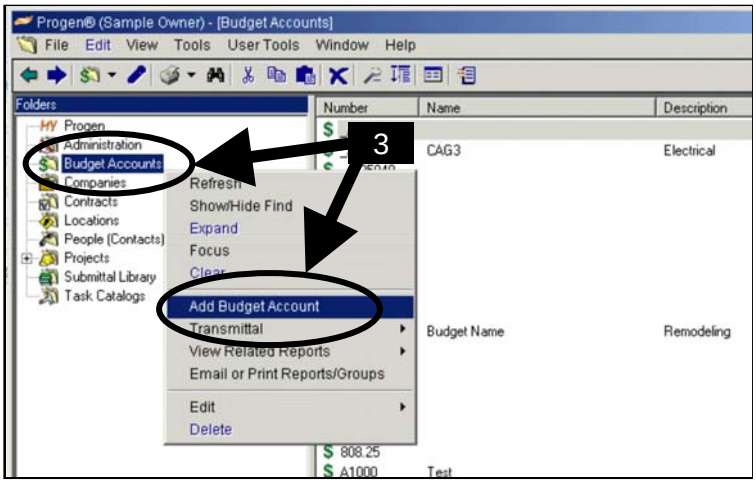
Budget Accounts - Adding, Editing and Deleting

RIGHT CLICK

Right click on Budget Accounts in the 'TREEVIEW' to view a drop down menu with multiple selections.

1) PROGEN stores all the different funding sources in one location under Budget Accounts. This data is found at the top level of the 'TREEVIEW'. Think of it as a list of checking accounts.

2) From Budget Accounts on the top level of the 'TREEVIEW', information can be added, edited or deleted.



NOTE

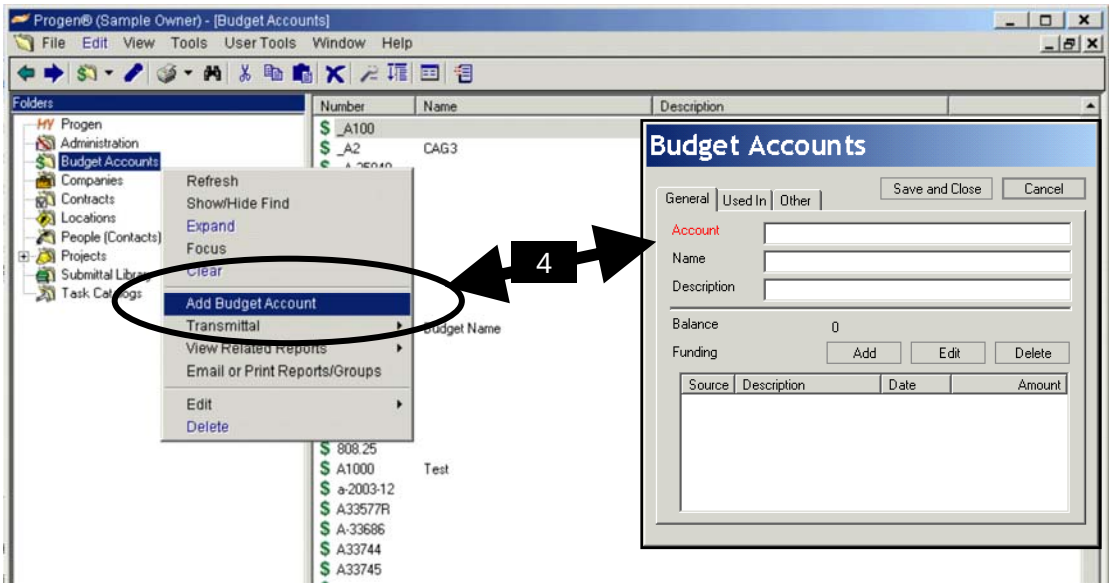
The user may not be able to ADD/EDIT/DELETE budget accounts because of his/her access rights.

3) To add a Budget Account, select 'ADD–BUDGET ACCOUNT' from the toolbar OR RIGHT CLICK on 'BUDGET ACCOUNTS' to show a drop down menu.

4) Select 'ADD BUDGET ACCOUNT' to open the Budget Accounts window. Enter the information for this new account.

NOTE

Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.



5) To edit a Budget Account, RIGHT CLICK on the selected budget account on the 'LISTVIEW' panel and select 'MODIFY BUDGET ACCOUNT' from the drop down menu.

6) This will open the 'BUDGET ACCOUNTS' window. Edit the information for this budget account and click Save and Close when finished.

7) To delete a Budget Account, select a budget account to be removed, then either:

   d. Click the Delete button on the toolbar

   e. Click delete on the keyboard

   f. RIGHT CLICK the budget account and select delete from the menu

Submittal Library – Adding, Editing and Deleting

1) PROGEN stores all the different submittal information in one location under 'SUBMITTAL LIBRARY'. This data is found at the top level of the 'TREEVIEW'.

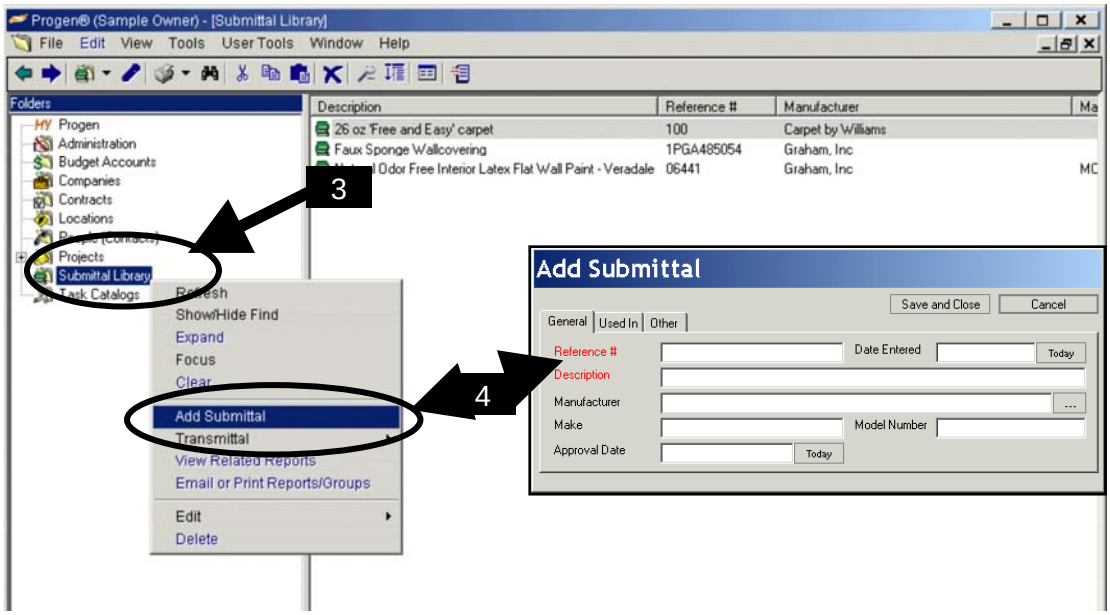
2) From 'SUBMITTAL LIBRARY' on the top level of the 'TREEVIEW', information can be added, edited or deleted.

3) To add a 'SUBMITTAL', RIGHT CLICK on 'SUBMITTAL LIBRARY' to show a drop down menu.

4) Select 'ADD SUBMITTAL' to open the 'ADD SUBMITTAL' window. Enter the information for this new account.

RIGHT CLICK

Right click on 'SUBMITTAL LIBRARY' in the 'TREEVIEW' to bring up a drop down menu with multiple selections.



NOTE

The user must CLICK on the 'Save and Close' button to save the changes made.

5) To edit a 'SUBMITTAL', RIGHT CLICK on the selected company on the 'LISTVIEW' panel and select 'MODIFY SUBMITTAL' from the drop down menu.

6) This will open the 'SUBMITTAL' window. Edit the information for this submittal.

7) To delete a 'SUBMITTAL', CLICK on a submittal to highlight it.

   d) CLICK the 'delete' button on the toolbar

   e) Click delete on the keyboard

   f) RIGHT CLICK the submittal and select delete from the menu.

Chapter 5 – CTC & Adding Items

Task Catalogs

NOTE

PROGEN has the capability to have numerous non-prepriced and estimate catalogs.

TECHNICAL

A PROGEN administrator may add additional catalogs. However, only the Gordian Group can add a Construction Task Catalog

1) There are three types of catalogs.

   a) One is the Gordian Construction Task Catalog. This book is part of the contract documents created by The Gordian Group.

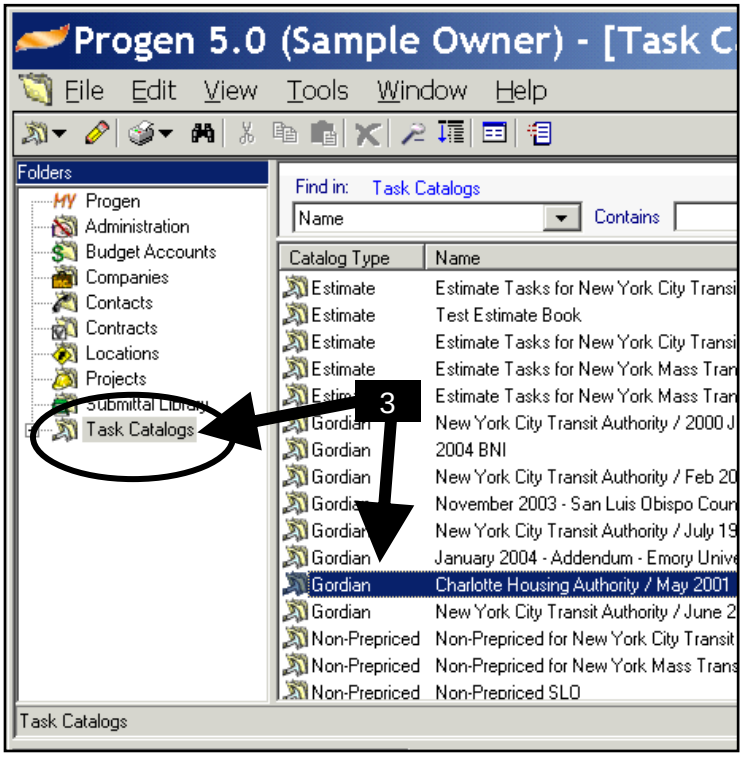
   b) Another task catalog is a Non-Prepriced catalog. This catalog is used by the contractor to add items to the contractor's proposal that are not listed in the Gordian Construction Task Catalog.

   c) The final type of task catalog is the estimate catalog. This catalog is used by the owner to add items to the owner's cost estimate that they receive from an independent source.

2) The contract Construction Task Catalog will be provided by The Gordian Group Inc. The tasks in the catalog cannot be edited or deleted. Users may only view the task items and add them to Proposals/Estimates.

3) To select the Construction Task Catalog to use, click 'TASK CATALOG' in the 'TREEVIEW' to show the listed catalogs available on the 'LISTVIEW' panel. Select the catalog from the listing.

4) To view items in a task catalog, drill into the selected catalog section by double clicking on the 'TREEVIEW' side.



Estimate/Non-Prepriced Tasks - Adding, Editing, Deleting

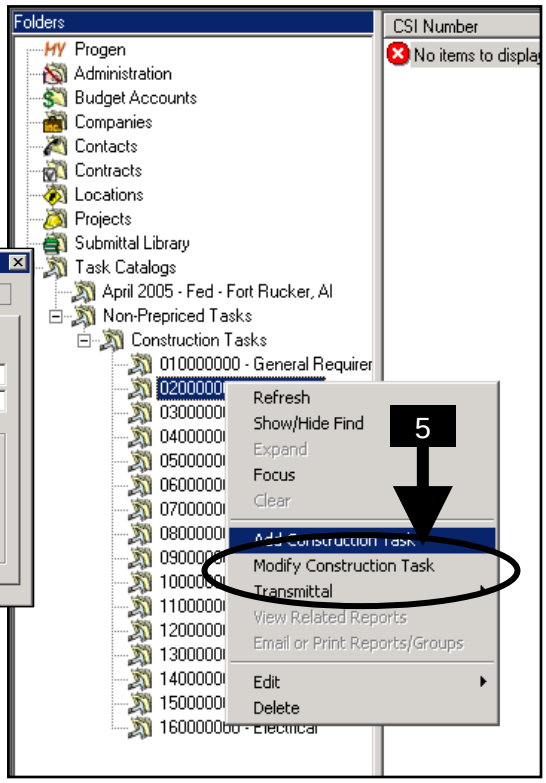
1) The process of adding, editing and deleting a task from a catalog are the same for the estimate or non-prepriced catalogs.

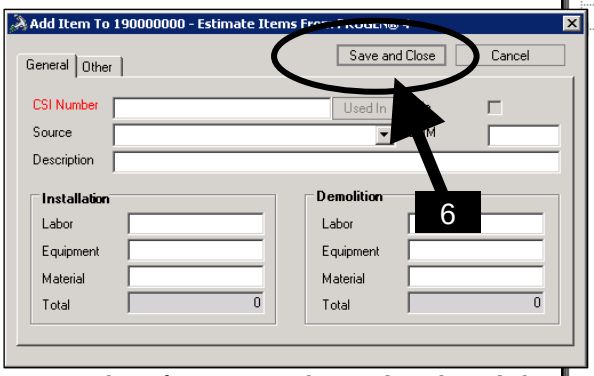
2) To ADD A TASK to a non-Gordian catalog, double click on 'TASK CATALOG' in the 'TREEVIEW' to expand the listing of catalogs available.

3) From this listing double click on the Non-Prepriced catalog of choice (if there are more than one). This will expand to show 'CONSTRUCTION TASKS'. Choose a title to open the appropriate section.

4) Right click on the Section to get a drop down menu.

5) Select 'ADD CONSTRUCTION TASK'. To open an 'ADD ITEM' window.





6) Enter the information in the window then click 'SAVE and CLOSE'.

7) To MODIFY A TASK, double click the CSI number in the 'CONSTRUCTION TASKS' section to open the 'MODIFY ITEM' window.

TIPS

When creating a Non-Prepriced item, try to include a Source, UOM, and Description. A list of UOM abbreviations can be found on page 5-4.

NOTE

Tasks cannot be modified that are already being used in a proposal.

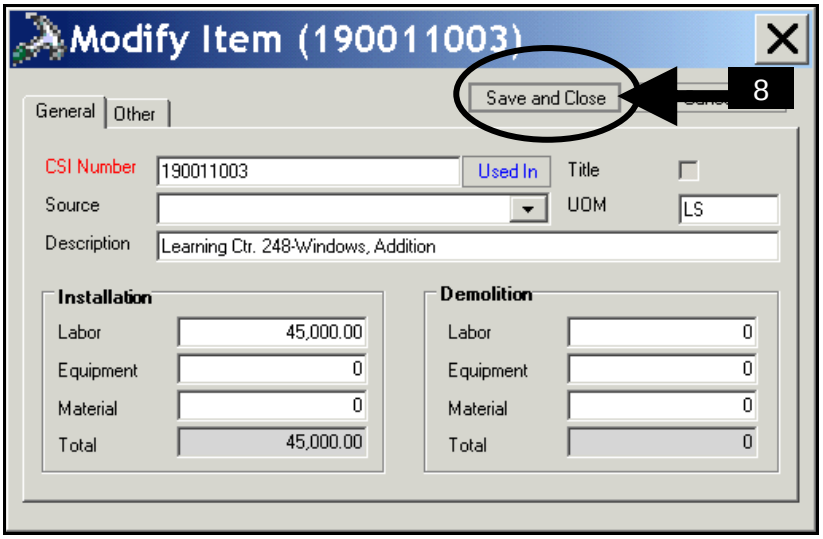
RIGHT CLICK

RIGHT CLICKING on an item in the 'TREEVIEW' will open a drop down menu.

8) Enter the approporiate information, then click ‘SAVE AND CLOSE’ button.

✔ NOTE

Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.

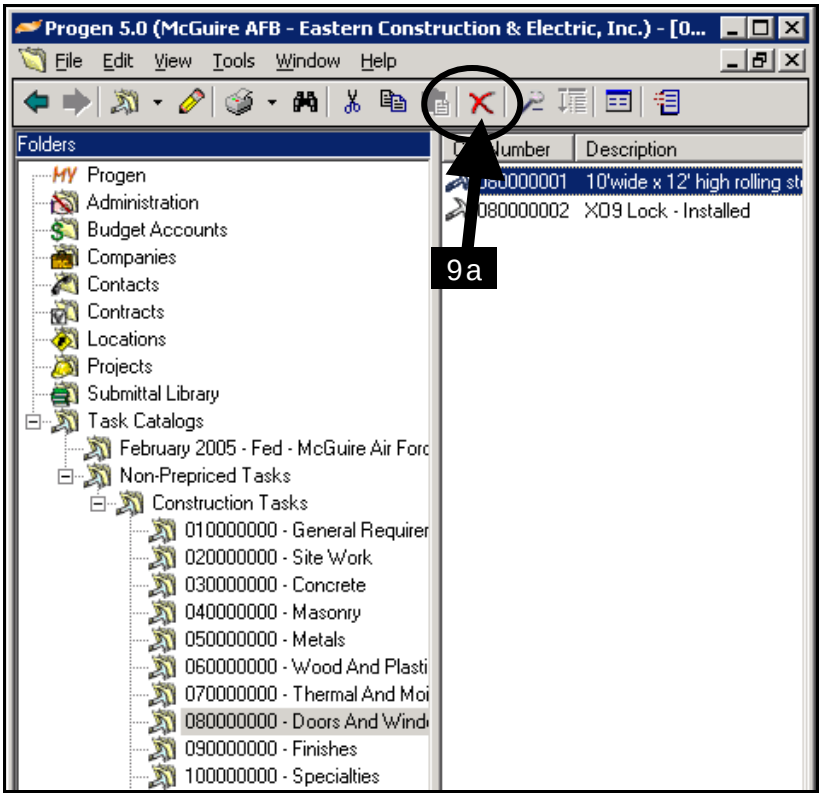


9) To delete a task click on a task to highlight it blue.

a) Click the ‘DELETE’ button on the toolbar.

b) Click delete on the keyboard.

c) Right click the task and select delete from the menu.



WARNING

If a Task Catalog or Section is DELETED, all tasks associated with it will also be deleted.

The following list is a collection of commonly used abbreviations (and their definitions) for Unit of Measures found within a typical Construction Task Catalog®:

UNIT OF MEASURE DEFINITIONS:

ACR – Acre
BAG – Bag
BBL – Barrel
BCY – Bank (In-place) Cubic Yards
BF - Board Foot
BOX – Box (each)
BTU - British Thermal Unit
C - One Hundred
CCF - One Hundred Cubic Feet
CCY – Compacted Cubic Yards
CF - Cubic Foot
CFM - Cubic Feet per Minute
CI – Cubic Inch
CLF - One Hundred Linear Feet
CSF - One Hundred Square Feet
CSY – One Hundred Square Yards
CWT - Carton Weight
CY - Cubic Yard
CYM - Cubic Yard Mile
DAY – Day
DRM – Drum (each)
EA – Each
FLR - Floor (Per Floor)
FT – Foot
GAL – Gallon
GSF - Ground Square Foot
HR – Hour
HWT - Hundred Carton Weight
HYR – Half Year
IN – Inch
JOB – Job
LAN – Lane
LB – Pound
LCY - Loose (Excavated) Cubic Yards
LF - Linear Foot
LFD - Linear Feet per Day
LIT – Liter
LOT – Lot
MBF - One Thousand Board Feet
MBH - One Thousand British Thermal Units
MCF – One Thousand Cubic Feet
MF3 - One Thousand Cubic Feet Per Minute
MGL – One Thousand Gallons
MI – Mile
MLF – One Thousand Linear Feet
MO – Month
MSF – One Thousand Square Feet
MSY - One Thousand Square Yards
MT – Metric Ton
MTK – Metric Ton Kilometer
M2 – Square Meter
M3K – Cubic Meter Kilometer
NTE – Note
OPN – Opening
OUT - Outlet or Output (each)
OZ – Ounce
PKG – Package
PNT – Point
PR – Pair
QT – Quart
ROL - Roll (each)
ROM – Room
ROW – Row
RSR - Riser (Per Rise)
SEA – Seat
SET – Set
SF - Square Foot
SHT – Sheet
SI - Square Inch
STP - Stop (each)
SQ - Square or One Hundred Square Feet
SY - Square Yard
SYI – Inches per Square Yard
TNM - Tons per Mile
TON – Ton
TRK – Truck Load
UI - United Inch
UNT – Unit
VLF - Vertical Linear Foot
WK– Week
YD – Yard
YR – Year

Part III - Initiating a Job Order

Chapter 6 - Creating a Project

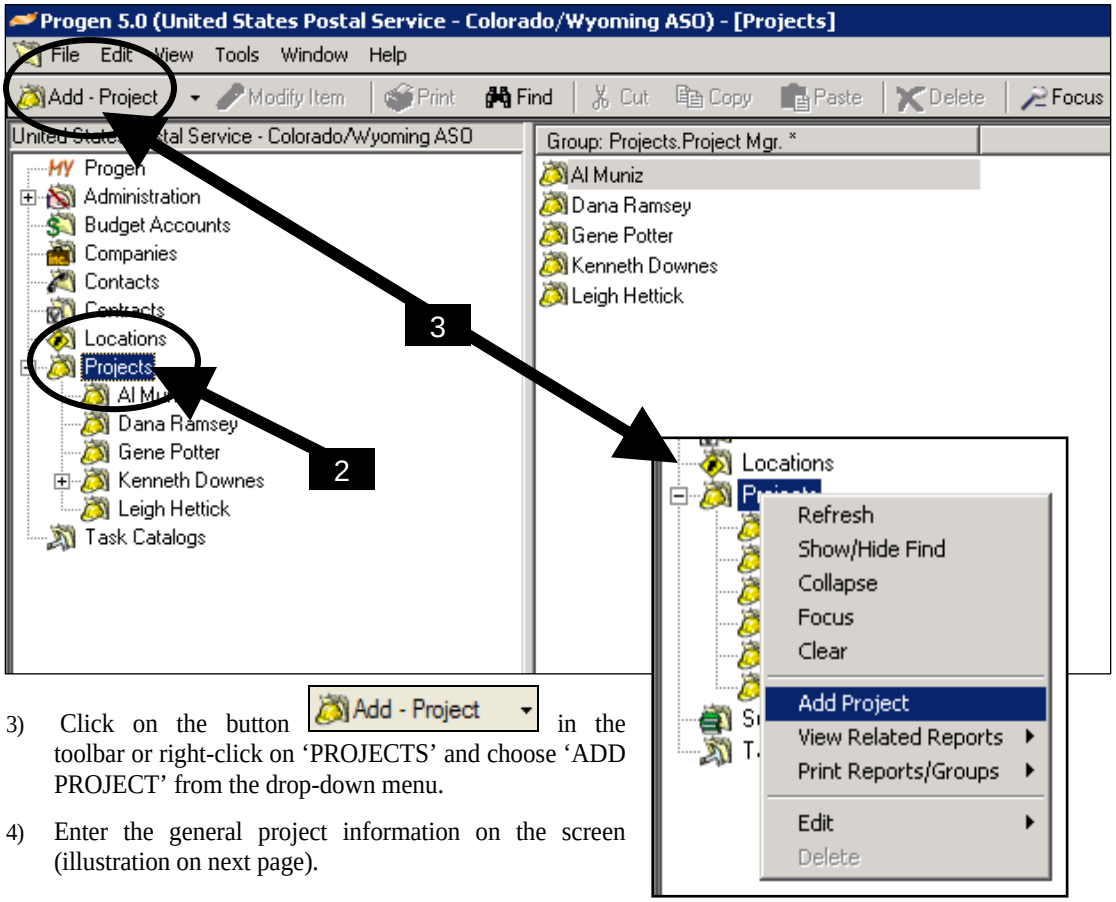
TIP

See PART 1 for information on launching and logging on to PROGEN

Add a New Project

1) Log into PROGEN.

2) Single click on 'PROJECTS' in the TREEVIEW (left) side of the screen:



3) Click on the button

in the toolbar or right-click on 'PROJECTS' and choose 'ADD PROJECT' from the drop-down menu.

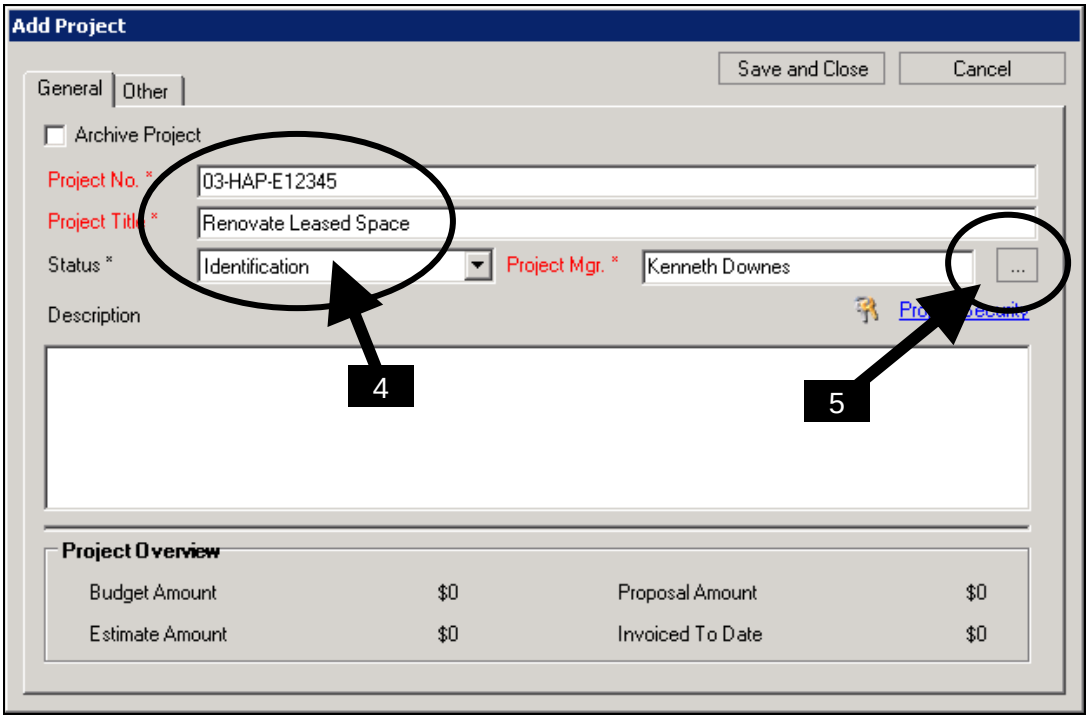
4) Enter the general project information on the screen (illustration on next page).

NOTE

Data fields with RED labels are required fields. They must have data input to be able to Save and Close.

NOTE

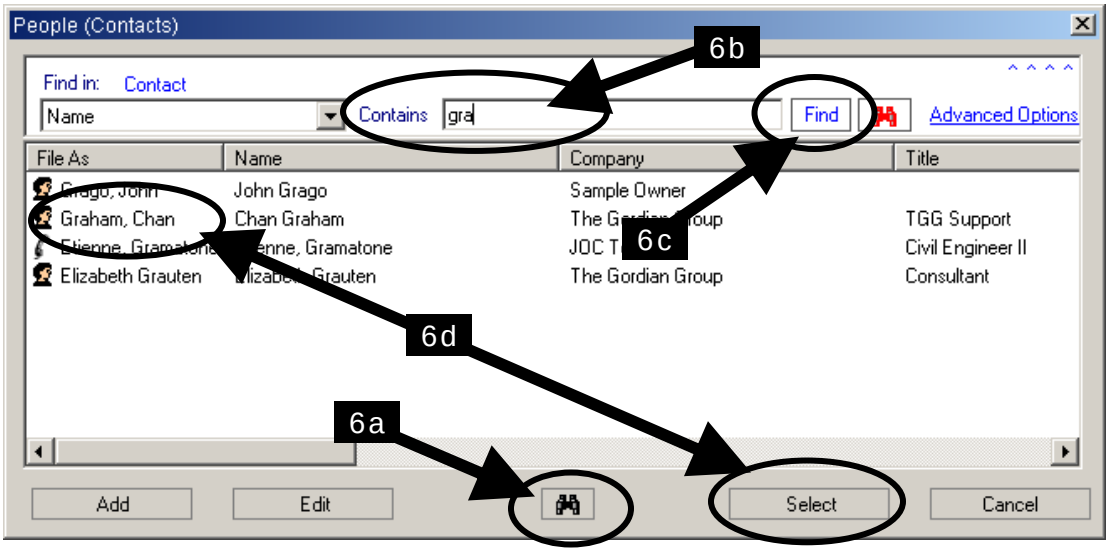
The 'PROJECT OVERVIEW' shows the total costs of all Job Orders listed under a project.



TIP

The Project Owner at the project level in PROGEN refers to the person WITHIN THE ORGANIZATION responsible for this project.

5) To enter the Project Owner, click the [...] button. This button opens a new window with all the contacts that have been entered into PROGEN.



6) It may be necessary to search for the person if there is a long list of contacts entered into PROGEN.

a) Open the search bar by clicking the [binoculars] button on the main screen.

b) Enter all or part of the Project Manager name in the 'Contains' field (make sure name is selected in the dropdown):

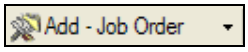
c) After the text is entered, click on the [Find] button.

d) Any contact in PROGEN containing the entered text will appear. Select the person by double-clicking on their name or single-click on their name and click 'Select'.

7) Click 'SAVE AND CLOSE' when all required fields are input.

Add a Job Order to the Project

1) Double click on the project in the 'TREEVIEW' side of the screen.

2) Click on 

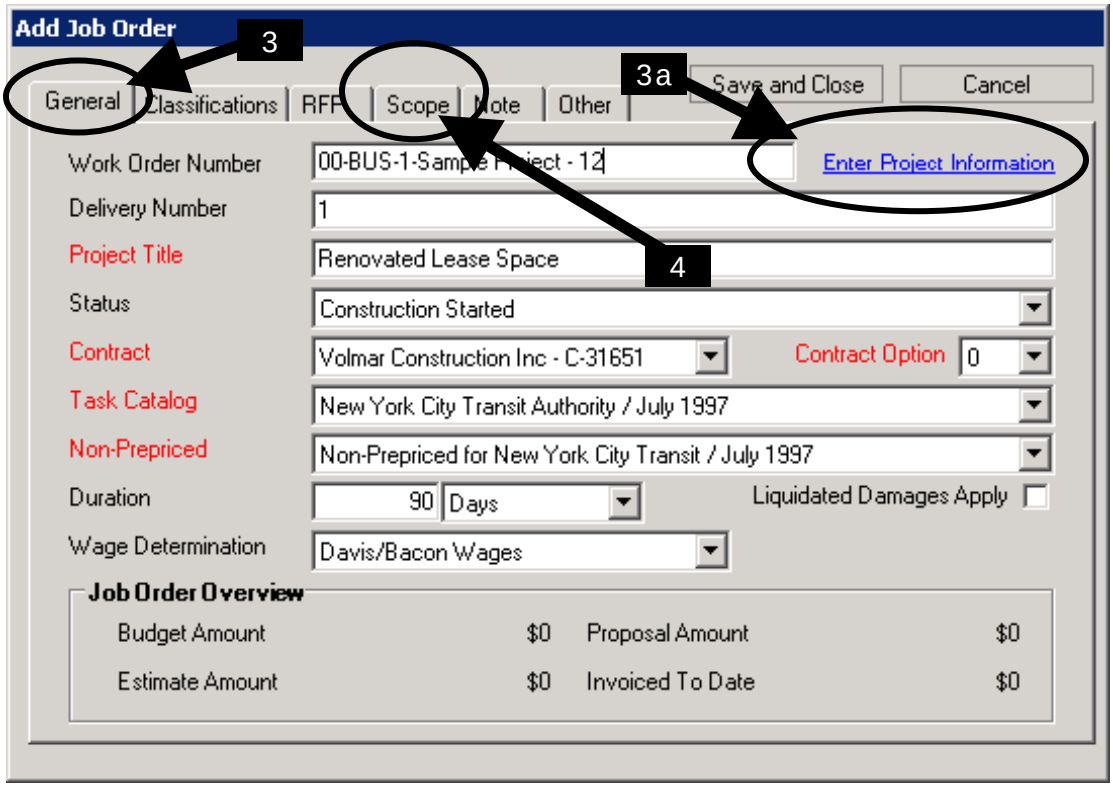
in the toolbar.

3) The 'ADD JOB ORDER' window will open. Note the tabs at the top of the screen. Enter all the general information on the 'GENERAL' tab.

   a) Click 'ENTER PROJECT INFORMATION' to copy project information to the Job Order.

   b) Generally, the Job Order Number is the same as the JOC Project Number with the addition of the '.01' or '.A' to signify it is the first Job Order for that Project.

   c) Enter all the necessary information including Job Order Number, Project Title, and choose the Contract and Contract Option from the drop down menu. The Task Catalog and Non-Prepriced Catalog will auto fill based on the contract selected.



RIGHT CLICK

Right-Click on ''JOB ORDERS' in the Treeview to add a job order. The 'ADD JOB ORDER' screen will appear as shown to the right.

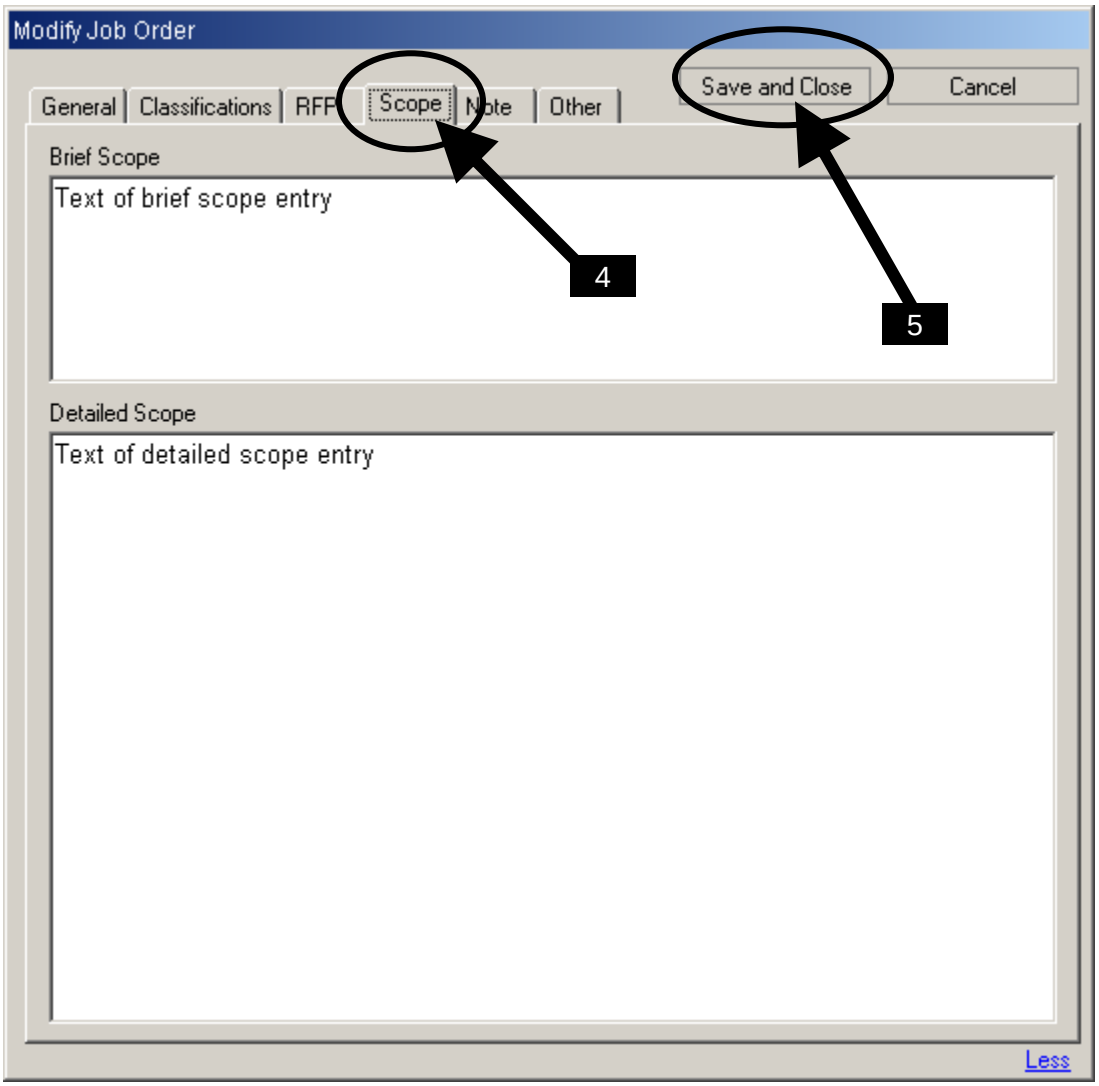
NOTE

The project status and the Job Order status are two different fields.

WARNING

Be sure to choose the correct contract and option so that proposals will validate.

4) To enter the brief scope of work choose the 'SCOPE' tab and enter the information in the 'BRIEF SCOPE' field. This information may appear on several reports.



✓ NOTE

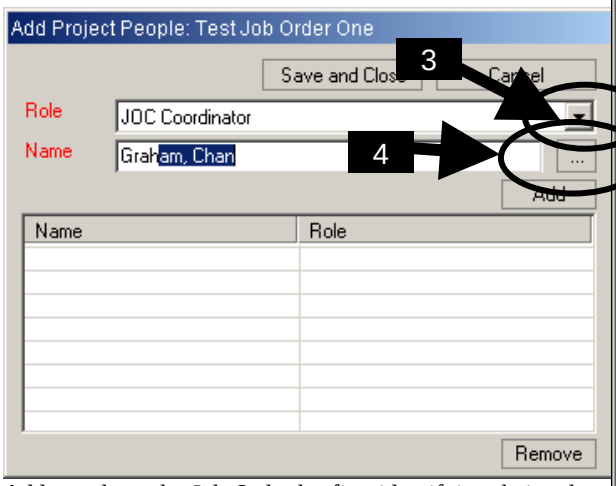
By clicking on 'More', more choices will appear

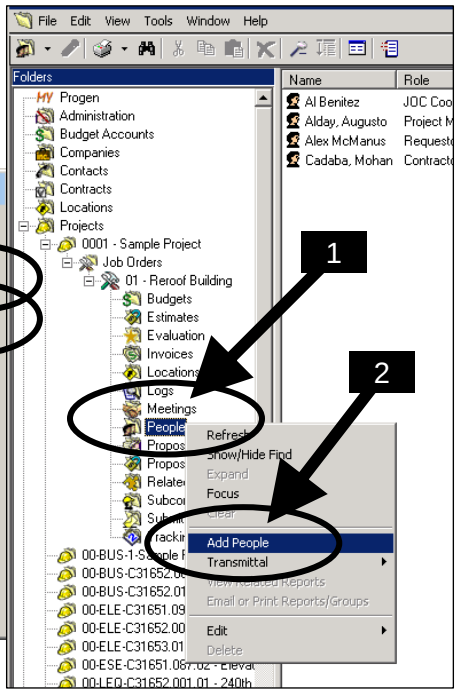
5) Once the required fields have been input in the Job Order window, click the 'SAVE AND CLOSE' button.

Add People to the Job Order

1) Click on ‘PEOPLE’ to view people associated with the Job Order.

2) Add people to the Job Order by right clicking on ‘PEOPLE’ and choose ‘ADD PEOPLE’. The ‘ADD PROJECT PEOPLE’ window will open.





3) Add people to the Job Order by first identifying their role in the drop down menu next to ‘ROLE’.

4) Click the ... button and select from the list of contacts.

✓ NOTE

Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.

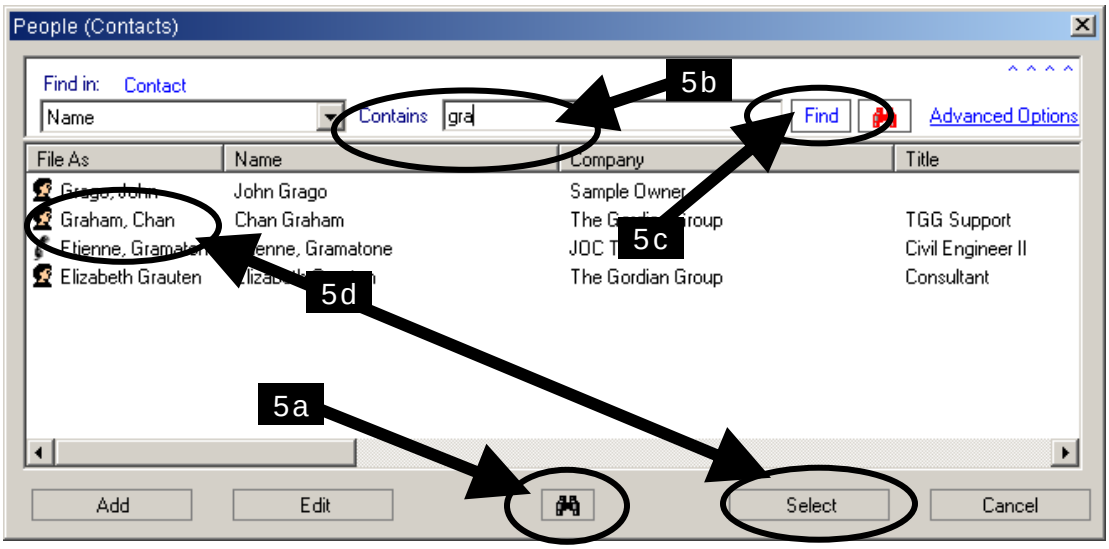
5) It may be necessary to search for the person if there is a long list of contacts entered into PROGEN.

   a) Open the search bar by clicking the button on the main screen.

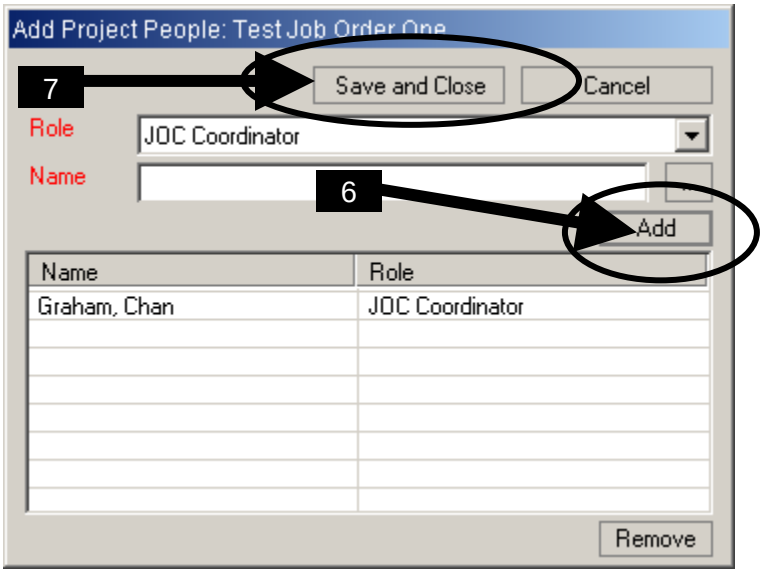
   b) Enter all or part of the Project Manager name in the 'Contains' field:

   c) After the text is entered, click on the Find button.

   d) Any contact in PROGEN containing the entered text will appear. Select the person by double-clicking on their name or single-click on their name and click 'Select'.



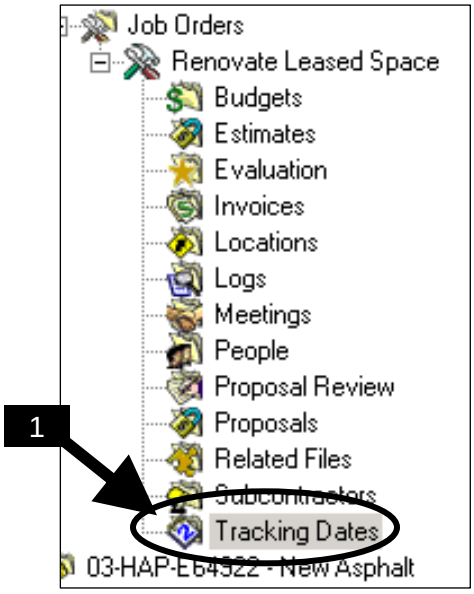
6) Click the 'ADD' button to add the person to the list. Repeat this procedure for each role that is needed for the Job Order. At a minimum, the Owner Project Manager and Contractor Project Manager should be entered.



7) Click 'SAVE AND CLOSE' to add the people to the Job Order.

Enter Initial Tracking Dates for the Job Order

1) View the Tracking Dates by single clicking on 'Tracking Dates' below the Job Order on the treeview.



NOTE

Dates will have to be entered into PROGEN throughout the JOC process.

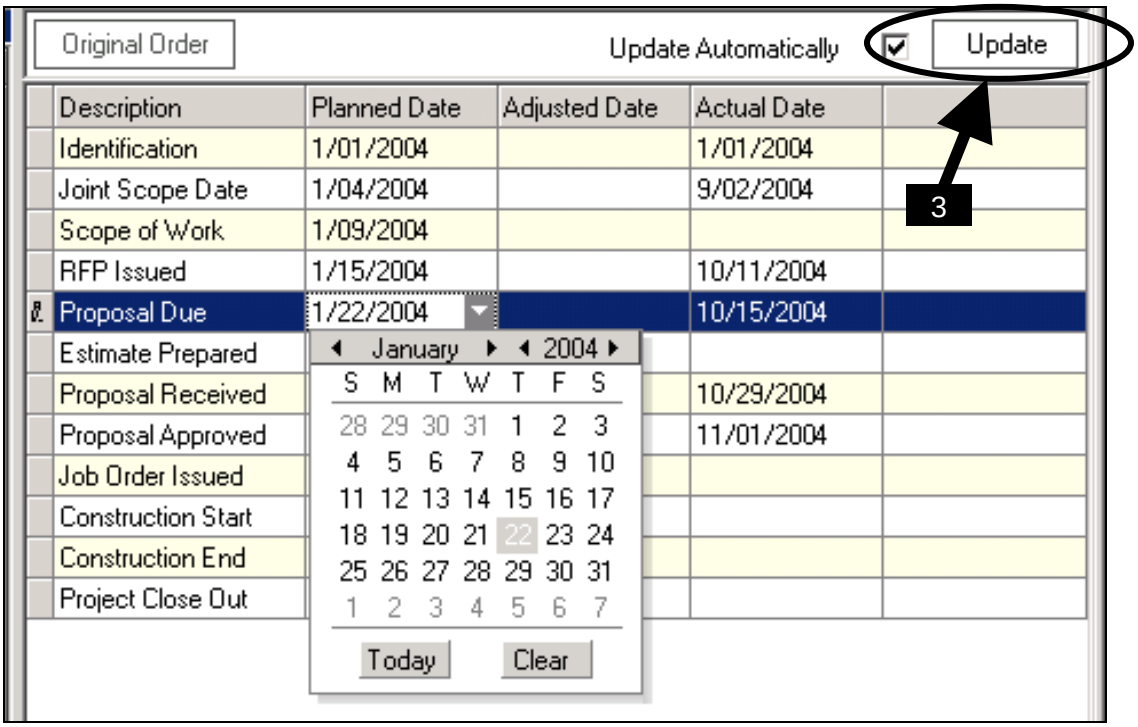
2) The list of date descriptions and three columns (Planned, Adjusted, and Actual) will be displayed. Click in the date field and enter a date.

   a) Click the down arrow and a drop down calendar will appear. Click on a date to enter it into the field.

3) If the Update Automatically checkbox is unchecked, click the 'UPDATE' button to save the dates.

TIP

When initiating a Job Order, input all planned dates in the fields that apply.



Add a Location to the Job Order

1) On the TREEVIEW side of the screen, right click on 'LOCATIONS'.

2) Select 'ADD LOCATION' from the drop down menu.

3) The list of locations in PROGEN will appear in the window.

4) It may be necessary to search for the location. To do so:

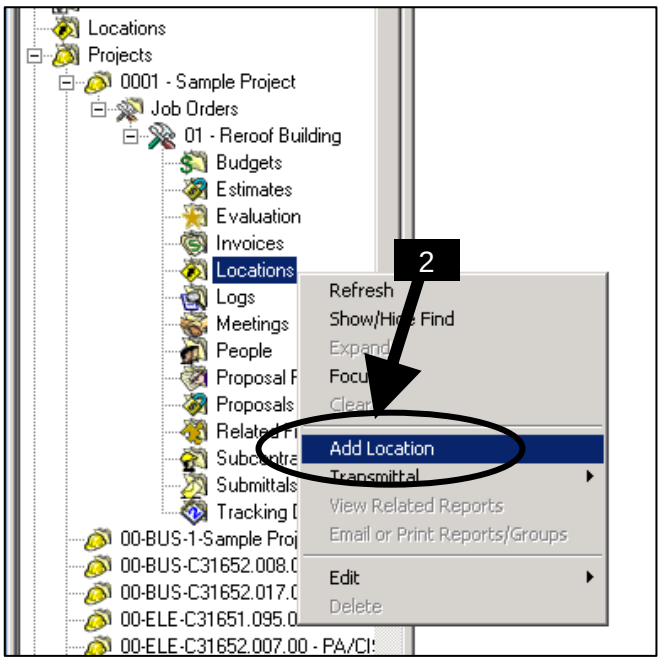
   a) Click button.

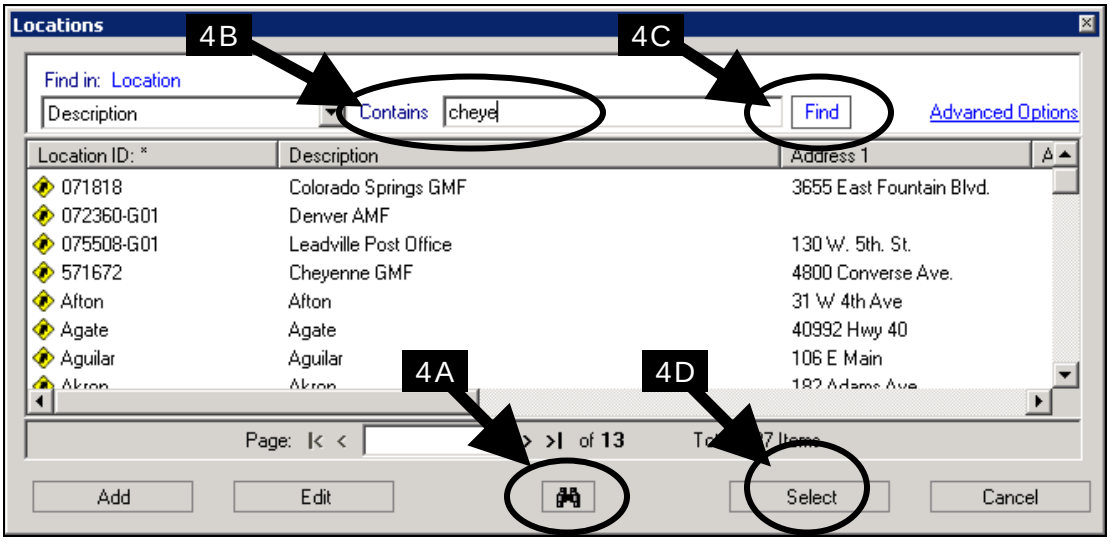
   b) Enter part of the name of the location being searched for in the 'CONTAINS' field.

   c) Click the Find button to the right.

   d) Locations that match the search entered will appear in the list.

   e) Double-click on the location to select it or single-click on the location and click 'SELECT'.





5) The location now appears in the LISTVIEW side of the screen and has been added to the Job Order.

TIP

To save time, a location can be associated with a different Job Order by dragging it from the 'LOCATIONS' window to another Job Order listed in the TREEVIEW. It will automatically put it in the 'LOCATIONS' folder for that Job Order.

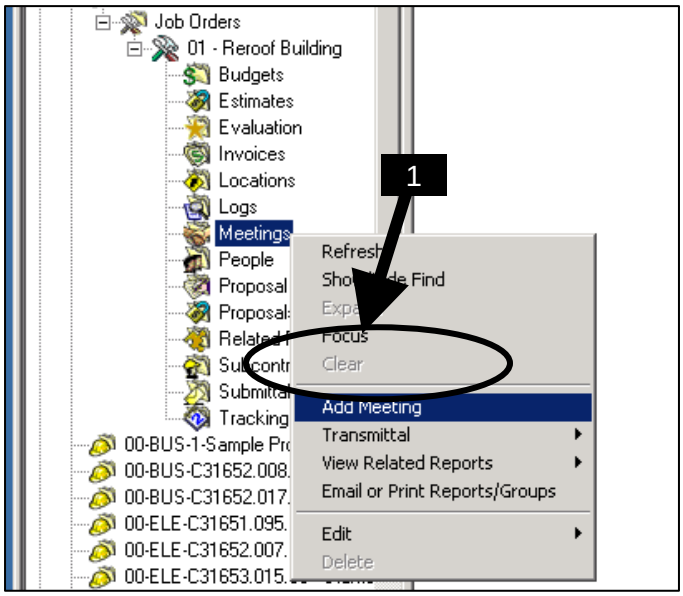
Add the Joint Scope Meeting

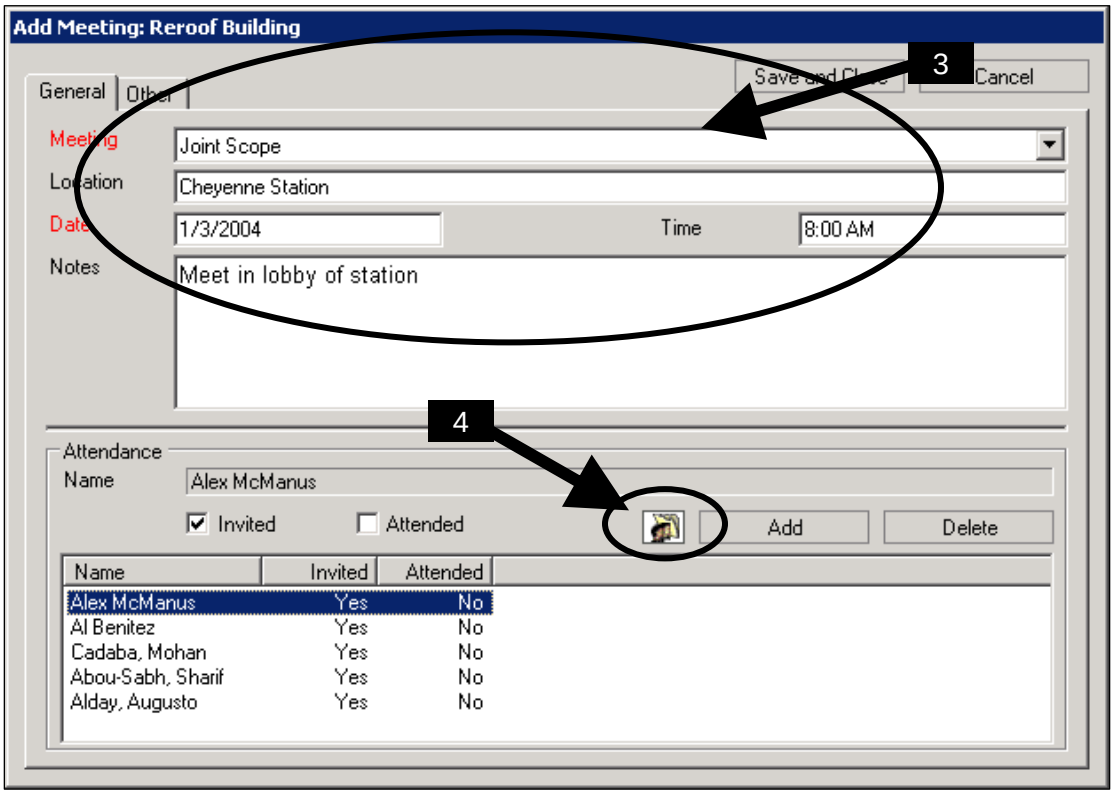
1) On the TREEVIEW side of the screen right click on 'MEETINGS' and select 'ADD MEETING'.

2) The 'ADD MEETING' window will open.

3) Select 'Joint Scope' from the 'MEETING' menu and enter the meeting date, time, location of the meeting (may or may not be at the site), and any other necessary information in the 'Notes' field (it will print on the Joint Scope Invitation letter).

4) Invite all project people to the Joint Scope Meeting by clicking the ' ' button.





NOTE

Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.

5) Click the 'SAVE AND CLOSE' button to save any changes and close the Add Meeting window.

Issue the Joint Scope Invitation

RIGHT CLICK

Do the same thing by right-clicking 'Meeting' and selecting 'View Related Reports / Joint Scope Invitation.

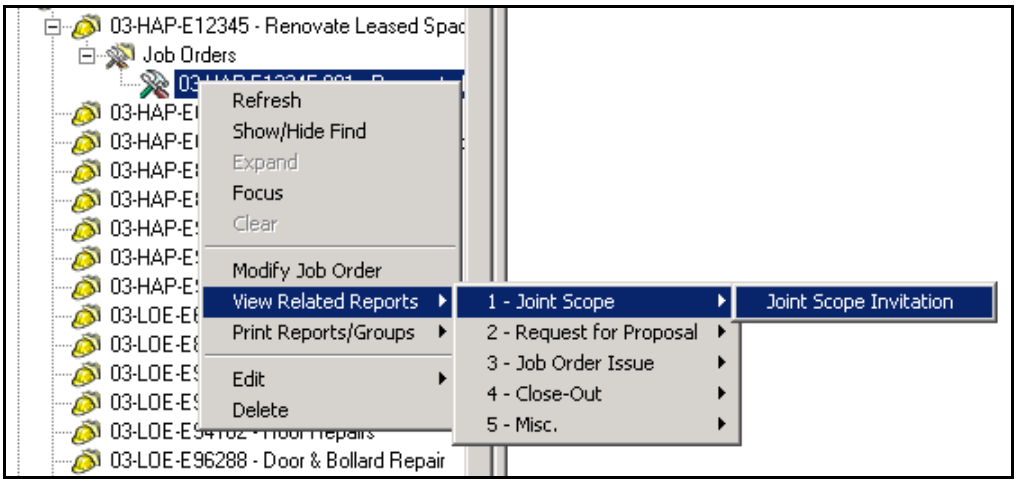
1) View the Joint Scope Invitation by right-clicking on the Job Order title and selecting 'View Related Reports / Joint Scope Invitation':

   a) This report may print from different locations:

      i) RIGHT-CLICK on Job Order - OR

      ii) RIGHT-CLICK on Meetings – OR

      iii) RIGHT-CLICK on the Specific Meeting



NOTE

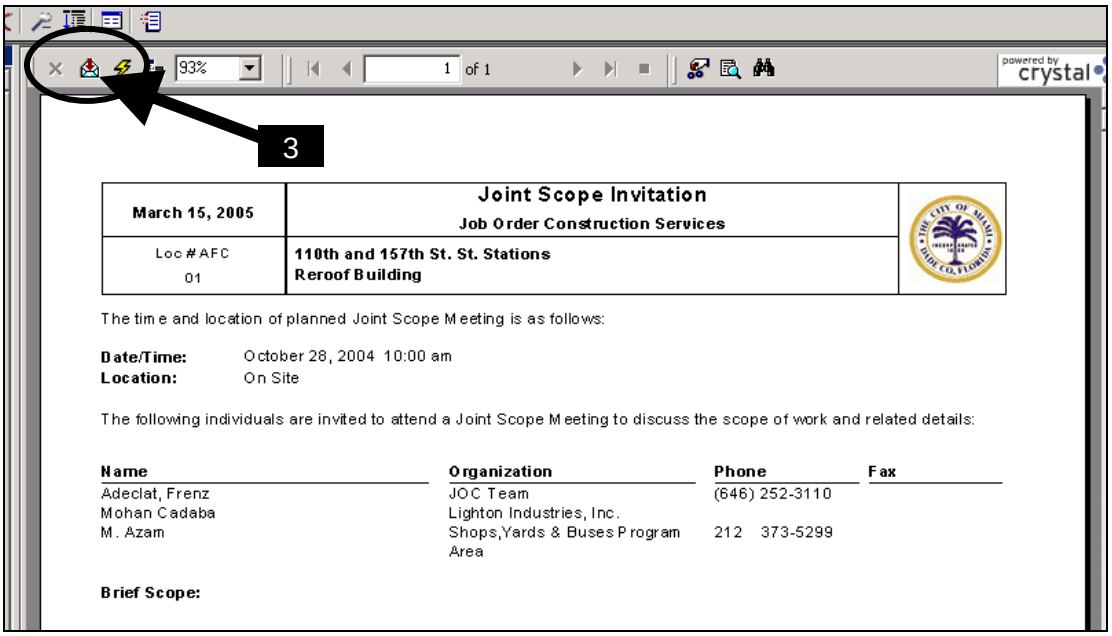
An alternative method of printing is to Print Reports/Groups, but this method does not preview the report prior to printing nor allow printer designation.

2) The Joint Scope Invitation appears on the LISTVIEW side of the screen. The Project Manager should verify that all the information is complete and properly entered.

   a) Print out the form by clicking on the printer icon in the TOOLBAR.

NOTE

Click on the Envelope icon to get the EXPORT window.



NOTE

Make sure the email checkbox is checked

WARNING

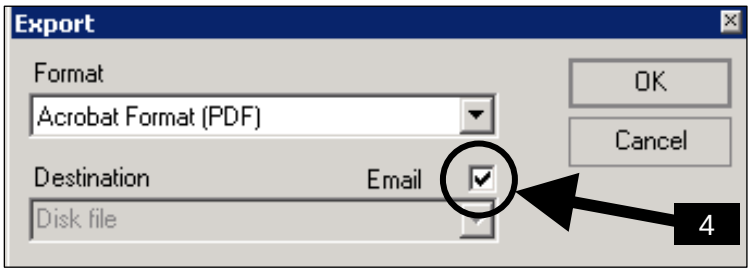
If the user's email address is not entered into PROGEN, the email check box will not be displayed. See Part II, People (Contacts) for more information.

WARNING

Note that there are no programming punctuations (periods, apostrophes, slashes, etc.) in the file name, except a period before the file extension.

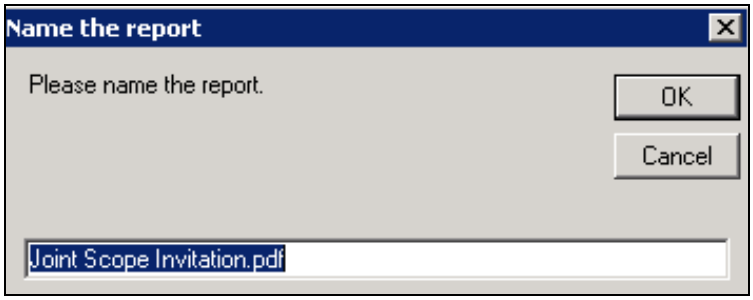
3) Click the 'EXPORT REPORT' envelope icon above the report shown in the 'LISTVIEW'.

   a) The 'Export' window will open.

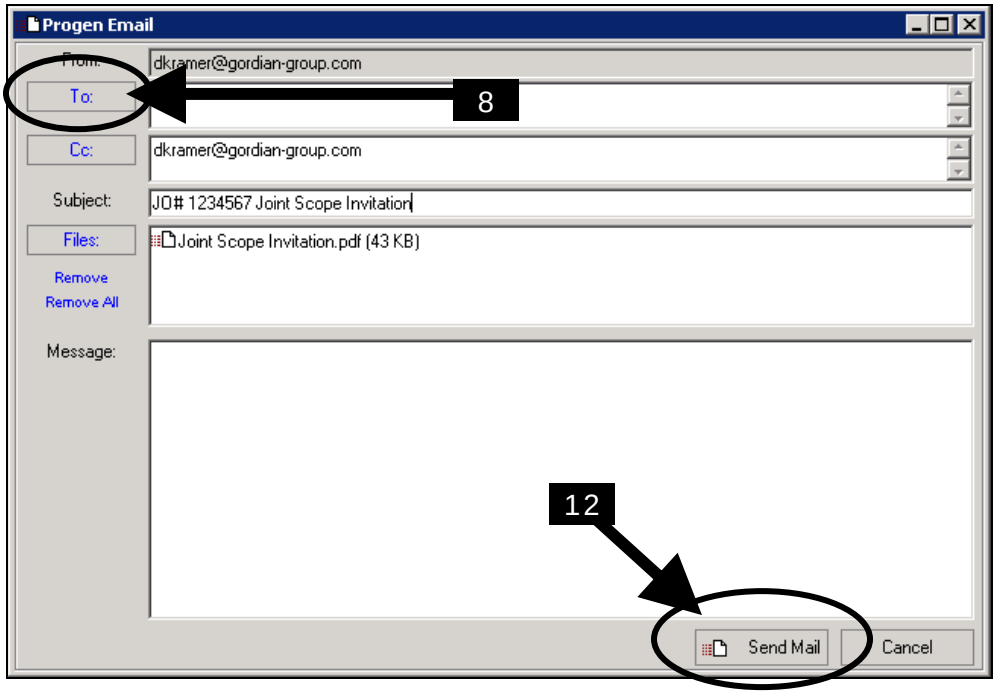


4) In the 'EXPORT' window check the 'EMAIL' box and then click 'OK'. Leave the default format as Acrobat format.

5) The 'NAME THE REPORT' window will display. When naming the report, the default name may be used, but we suggest adding the job number in front of it so the correct email can be located easier. Click OK.



6) The 'PROGEN EMAIL' window will open. Enter a subject in the subject field.



TIP

It is recommended to add the Job Order number to the front of the file name for easy reference.

TECHNICAL

Some email systems WILL NOT deliver or accept emails without a 'SUBJECT' entered.

7) Enter any message to the recipient(s) in the message field.

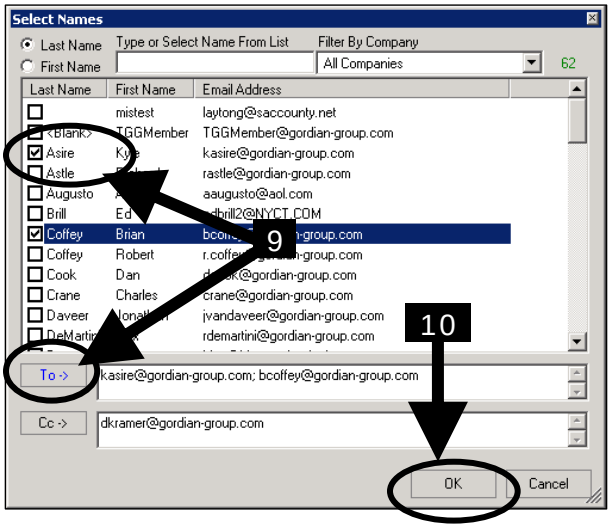
8) Click the 'TO' To: button to choose a recipient(s).

9) The 'SELECT NAMES' window will open. This listing shows only the contacts that have an email address entered in PROGEN.

   a) Click the check box next to the desired name(s).

   b) Click the 'TO' To -> button to enter the checked name(s) in the box.

10) Click the 'OK' button and the 'SELECT NAMES' window will close.



TIP

Put a checkbox next to the person to be emailed, and click the "To" button, or the "Cc" button and click "OK".

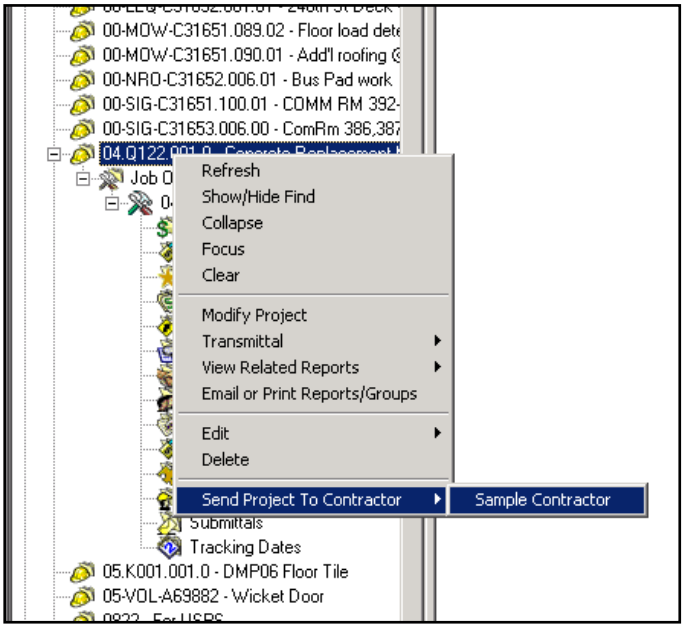
11) Click the Send Mail button on the 'PROGEN EMAIL' window to send the email. When the message "The message was sent successfully" appears, click 'OK'.

Send the Job Order to the Contractor

After the Project and Job Order have been initiated, the data that was just input can be sent to the contractor. This helps ensure that the contractor's Project & Job Order numbers match the facility owner's, and helps PROGEN import proposals into the correct Job Order. It may also save the contractor time and effort so that they can focus on estimating proposals.

All information added to any field in the Project and Job Order will transfer to the contractor, including:

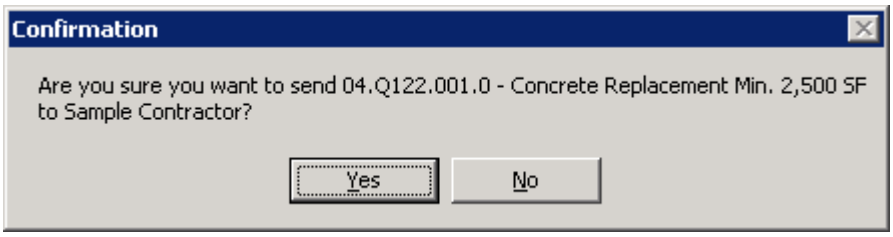
- All fields in the General tab for both the Project and the Job Order with the exception of the contract
- All fields in the Other tab for both the Project and the Job Order
- All fields in the RFP tab of the Job Order
- Brief Scope
- Detailed Scope
- Notes



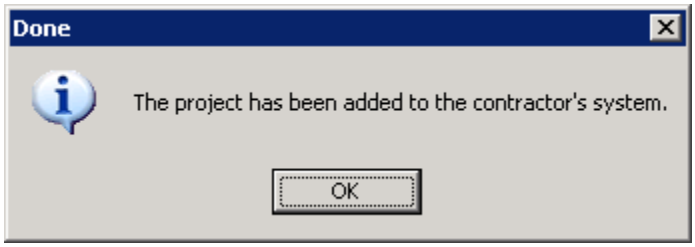
TIP

If the information is already known for the request for proposal or detailed scope, then input that information before sending the Job Order to the contractor.

1) Right click on the project in the 'TREEVIEW' side of the screen to open a menu.
2) Select 'Send Project To Contractor' from the menu and a list of linked contractors will display.
3) Select the contractor to send this data to, and the following window will open:



4) Click 'YES' to confirm.
5) The 'DONE' window will open to show that the project has been added to the contractor's system.
6) Click 'OK'



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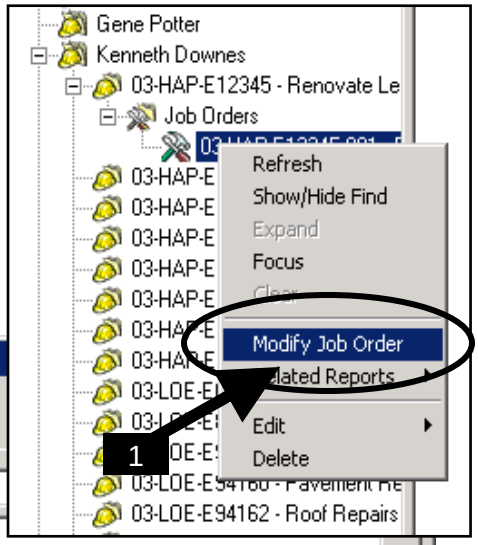
Chapter 7 – Request for Proposal

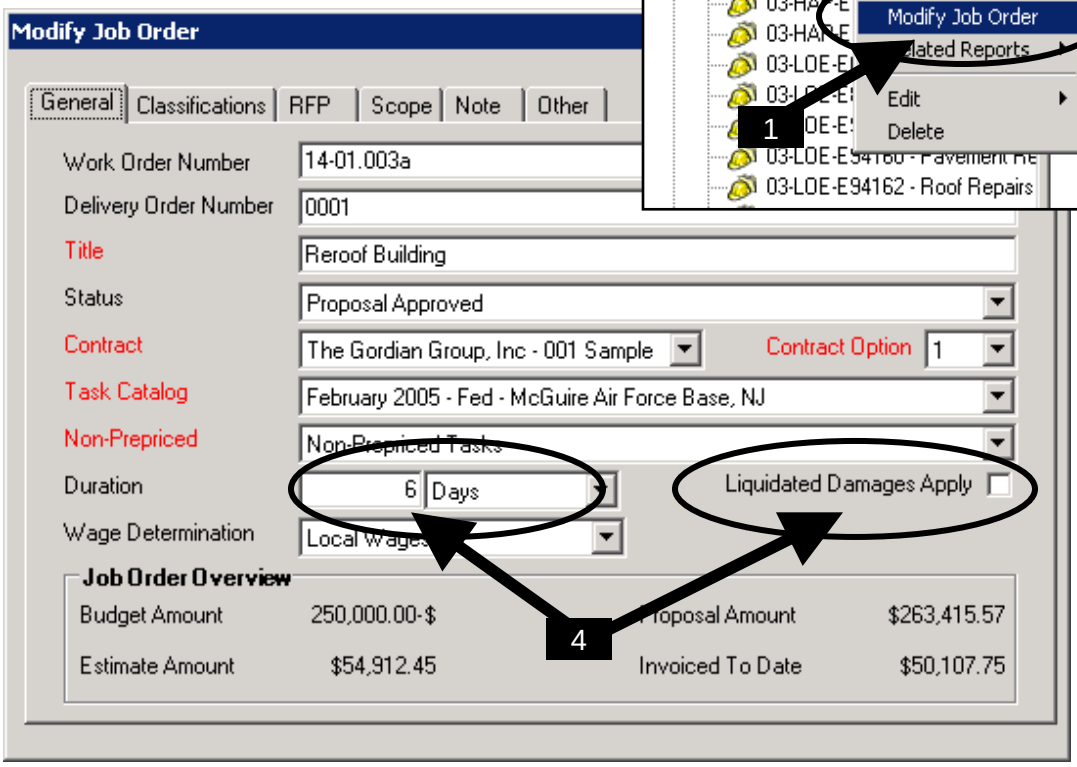
Enter 'General' Information in the 'Modify Job Order' Window

RIGHT CLICK

Right click on an item to show a menu.

1. Modify the Job Order by right clicking on the Job Order title and selecting 'MODIFY JOB ORDER'.
2. The 'MODIFY JOB ORDER' window will open.
3. Enter all applicable information.
4. Enter the expected construction duration (usually days) and whether liquidated damages will apply (check box).





NOTE

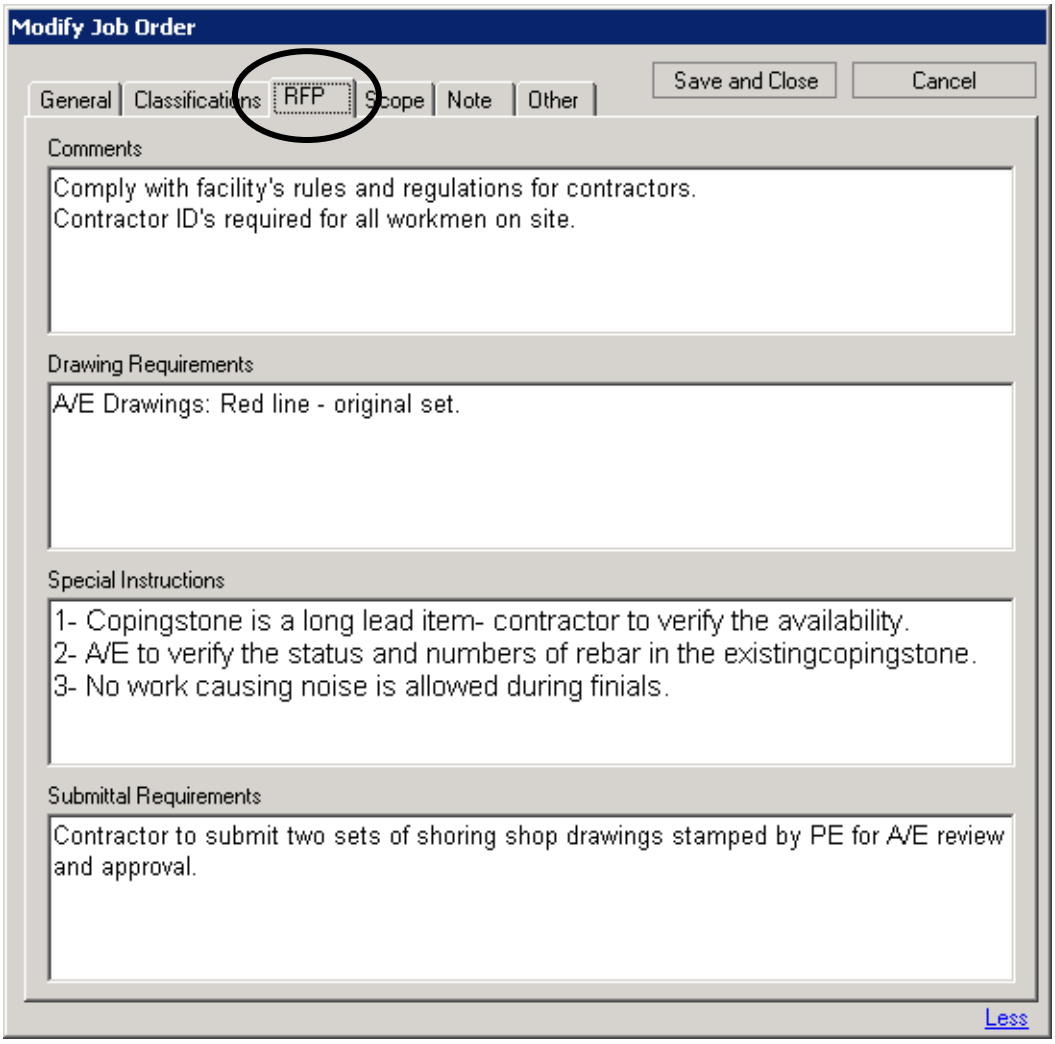
Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.

NOTE

For most projects, liquidated damages will not apply and this box should not be checked.

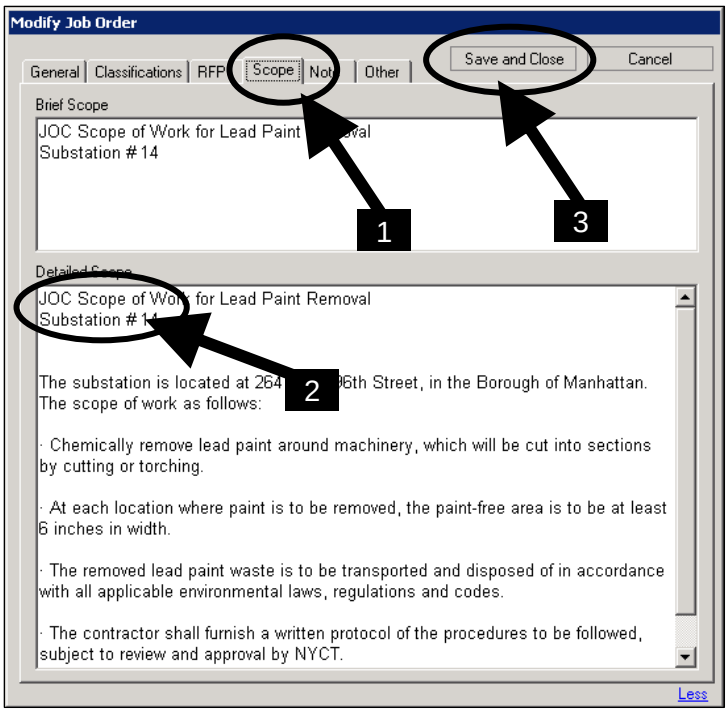
Enter 'RFP' Information in the 'Modify Job Order' Window

Enter 'RFP' information by selecting the 'RFP' tab on the 'MODIFY JOB ORDER'. The 'RFP' tab is where the Project Manager details all non-scope requests to the contractor that may affect the project cost. These requests appear on the Request for Proposal report.


Modify Job Order
General
Classifications
RFP
Scope
Note
Other
Save and Close
Cancel
Comments
Comply with facility's rules and regulations for contractors.
Contractor ID's required for all workmen on site.
Drawing Requirements
A/E Drawings: Red line - original set.
Special Instructions
1- Copingstone is a long lead item- contractor to verify the availability.
2- A/E to verify the status and numbers of rebar in the existingcopingstone.
3- No work causing noise is allowed during finials.
Submittal Requirements
Contractor to submit two sets of shoring shop drawings stamped by PE for A/E review and approval.
Less

Enter 'Scope' Information in the 'Modify Job Order' Window

1) Enter the Detailed Scope of Work by selecting the 'SCOPE' tab.
2) Enter the Detailed Scope of Work in this field or copy and paste from another document.
3) Click the 'SAVE AND CLOSE' button when finished to save all entered information and close the 'MODIFY JOB ORDER' window.

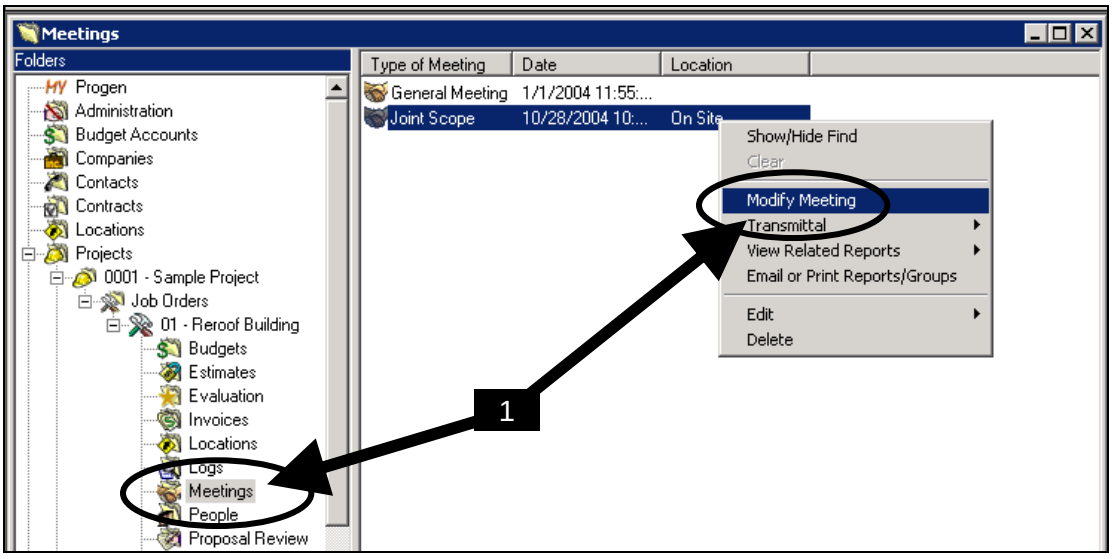

Modify Job Order
General
Classifications
RFP
Scope
Other
Save and Close
Cancel
Brief Scope
JOC Scope of Work for Lead Paint
Substation # 14
1
3
JOC Scope of Work for Lead Paint Removal
Substation # 14
2
The substation is located at 264
6th Street, in the Borough of Manhattan.
The scope of work as follows:
· Chemically remove lead paint around machinery, which will be cut into sections by cutting or torching.
· At each location where paint is to be removed, the paint-free area is to be at least 6 inches in width.
· The removed lead paint waste is to be transported and disposed of in accordance with all applicable environmental laws, regulations and codes.
· The contractor shall furnish a written protocol of the procedures to be followed, subject to review and approval by NYCT.
Less

TIPS

When writing the DSOW, use a word processing program such as Microsoft Word and then copy and paste the text into PROGEN.

Enter Joint Scope Meeting Information in the 'Meeting' Window

1) Confirm attendance at the Joint Scope Meeting by double clicking on 'MEETINGS' on the Job Order level. Right click on the meeting to get a menu and select 'MODIFY MEETING'.

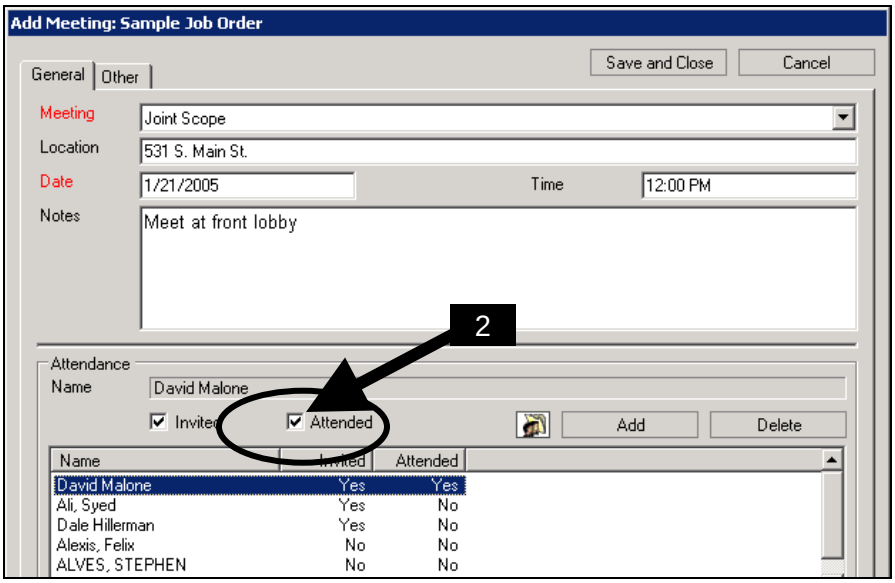


2) Highlight each person individually that attended the Joint Scope and check the 'Attended' check box.

TIP

Select the individual from the attendance list, and check the box if they attended the meeting.

Once the "Attended" box is checked, "Yes" appears under "Attended".



Enter Tracking Dates

1) View the Tracking Dates by single clicking on 'TRACKING DATES' at the Job Order level on the TREEVIEW (left) side.

2) The tracking date grid will be displayed on the details side.

   a) Click into any field to enter or edit the date.

   b) Click the down arrow on the right side of the date cell and a drop down calendar will appear. Click on a date to enter it into the field.

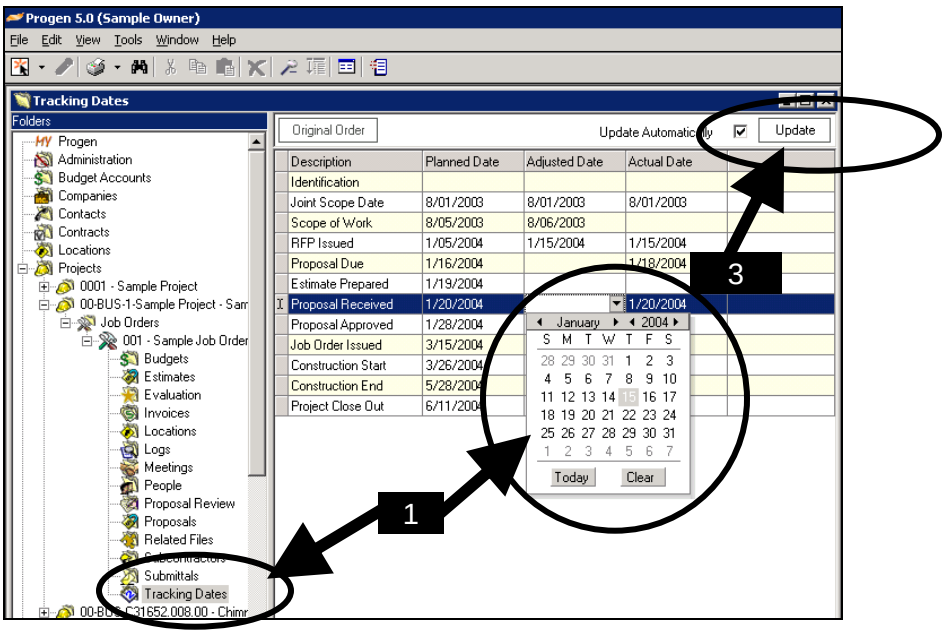
3) If the Update Automatically checkbox is unchecked, click the 'UPDATE' button to save the dates.

NOTE

Three types of dates are tracked in PROGEN: Planned, Adjusted, and Actual. These dates are useful in evaluating Contractor performance over a long period of time. It is crucial for the Project Manager to update these dates routinely.

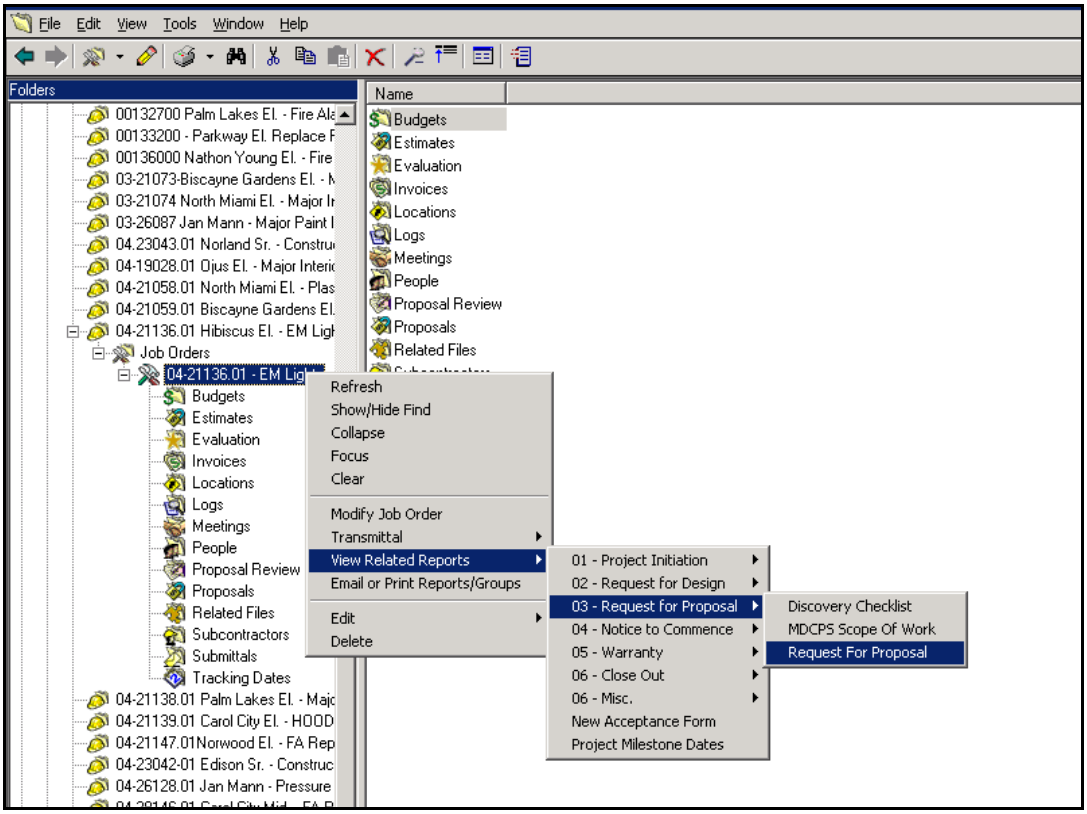
TIP

When initiating a Job Order, input all planned dates in the fields that apply.

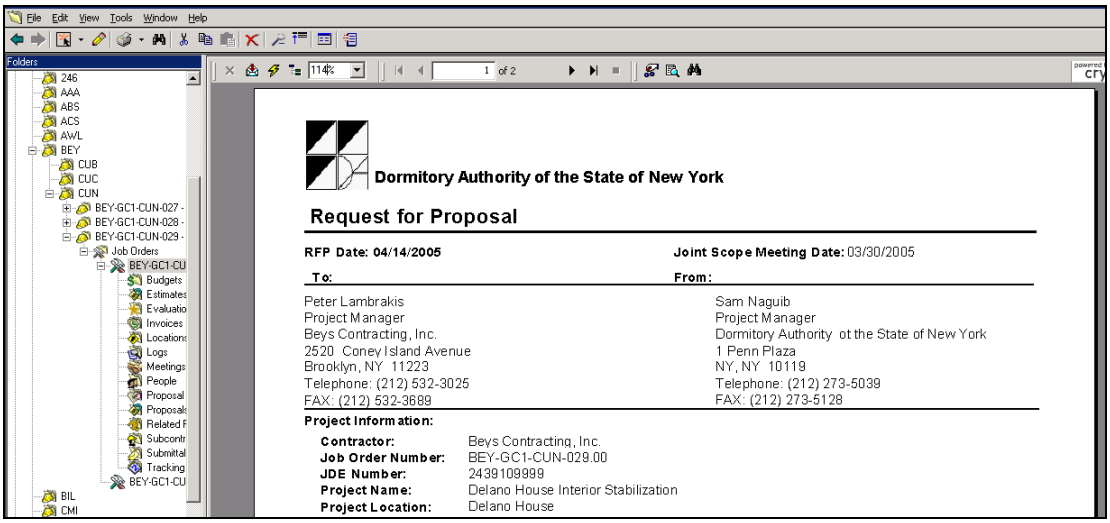


Review the RFP and Detailed Scope of Work prior to Sending to the Contractor

1) Review the Request for Proposal by right clicking on the Job Order and selecting 'VIEW RELATED REPORTS / REQUEST FOR PROPOSAL'.



2) Review the RFP to make sure all information is complete before sending it to the Contractor. The report is displayed on the LISTVIEW (right) side of the screen:

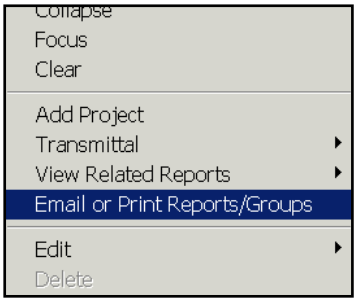


3) Follow the same procedure to review the Detailed Scope of Work.

✓ NOTE

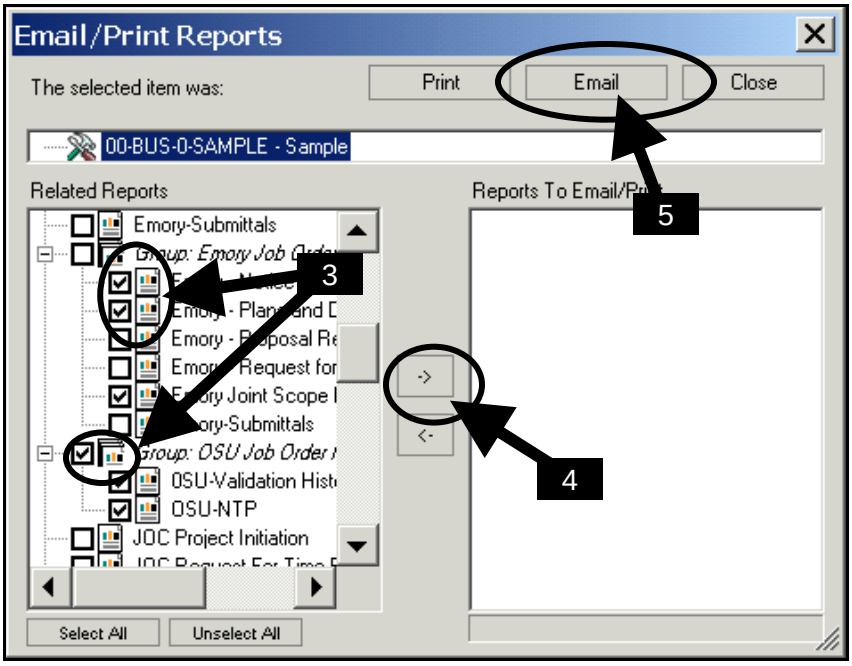
After viewing the report, you can email it by clicking the email icon in the report toolbar immediately above the report.

Email/Print Report Groups to the Contractor

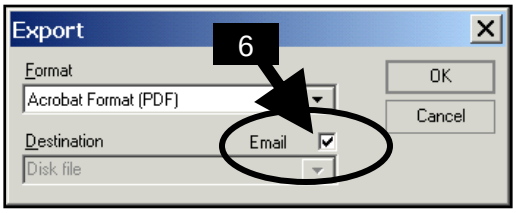


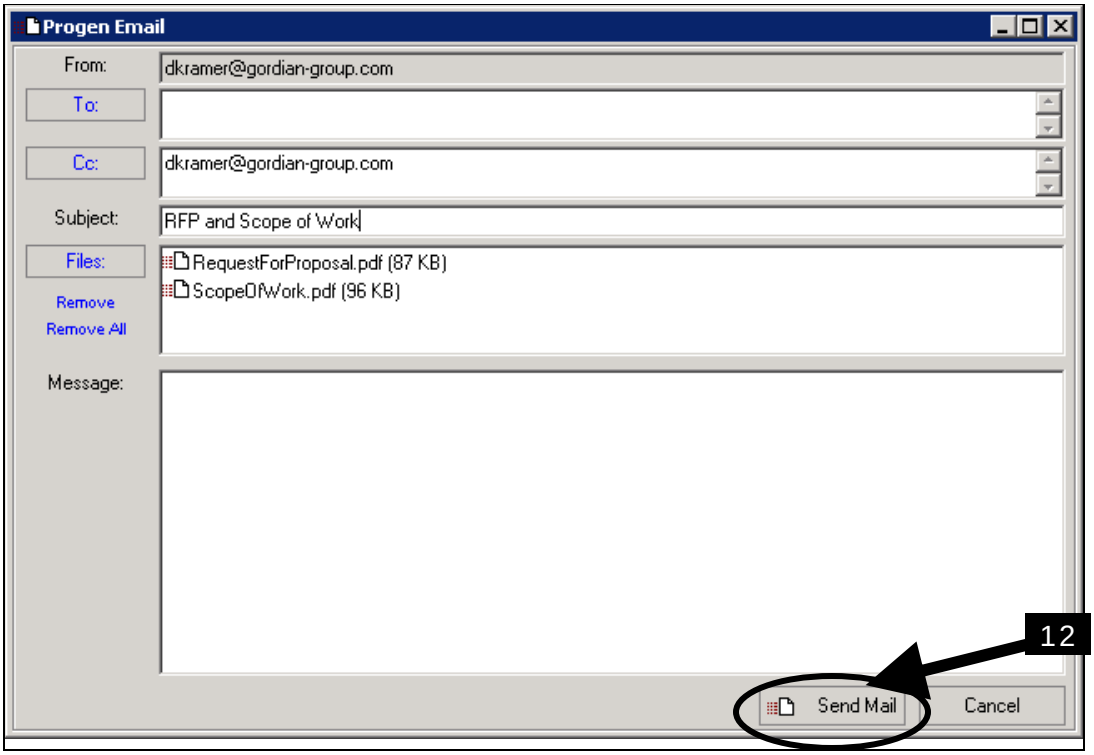
Emailing multiple reports is best accomplished by going to 'EMAIL OR PRINT REPORTS/GROUPS'.

1) Right click on the corresponding folder and choose 'EMAIL OR PRINT REPORTS/GROUPS'.
2) The 'EMAIL/PRINT REPORTS' window will open.
3) Select the reports to send by clicking the check boxes next to them.
4) Click the (right arrow) to move the selected reports to the 'REPORTS TO EMAIL/PRINT' field.
5) Click the 'EMAIL' button.



6) In the 'EXPORT' window place a check in the 'EMAIL' box and make sure that the format is PDF.





7) The 'PROGEN EMAIL' window will open. Enter a subject in the subject field.

8) Enter any message to the recipient(s) in the message field.

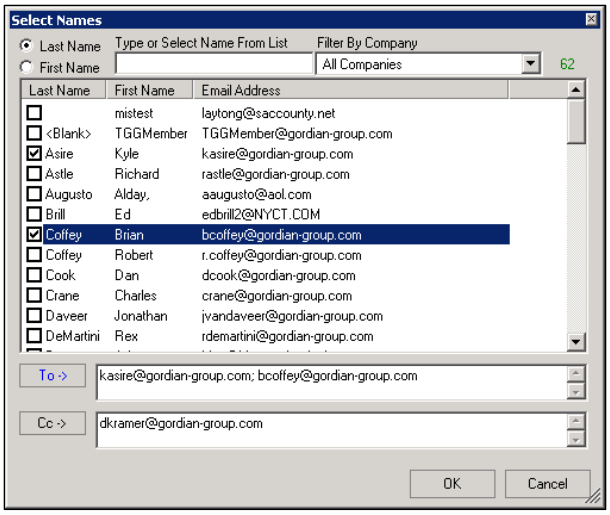
9) Click the 'TO' To: button to choose a recipient(s).

10) The 'SELECT NAMES' window will open. This listing shows only the contacts that have an email address entered in PROGEN.

    a) Click the check box next to the desired name(s).

    b) Click the 'TO' To -> button to enter the name(s) in that window area.

11) Click the 'OK' button and the Select Names window will close.



12) Click the Send Mail button on the 'PROGEN EMAIL' window to send the email. When the message "The message was sent successfully" appears, click 'OK'.

TECHNICAL

Some email systems WILL NOT deliver or accept emails without a 'SUBJECT' entered.

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Chapter 8 - Creating an Independent Cost Estimate – Lump Sum or Detailed

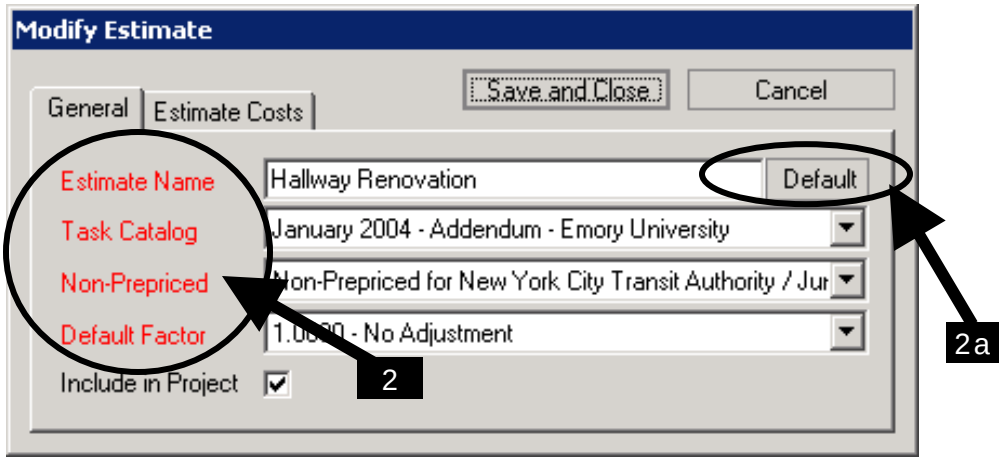
Within the Job Order folder, there will be an 'ESTIMATES' Folder and a 'PROPOSAL' Folder. Estimates are for the OWNERS' USE and PROPOSALS are for the CONTRACTORS' USE. As with most PROGEN functions, there are several ways to build an estimate. This guide will demonstrate the easiest and/or most commonly used; there may be other ways to perform some of the same functions demonstrated as follows.

Lump Sum Cost Estimate

TIP

See PART 1 for information on launching and logging on to PROGEN.

1) Right click on the 'ESTIMATES' folder, then select 'ADD ESTIMATE'.
2) In the 'ADD ESTIMATE' window, input information for all of the data fields that have red labels.
   a) Click the default button to use Job Order title for the estimate name.



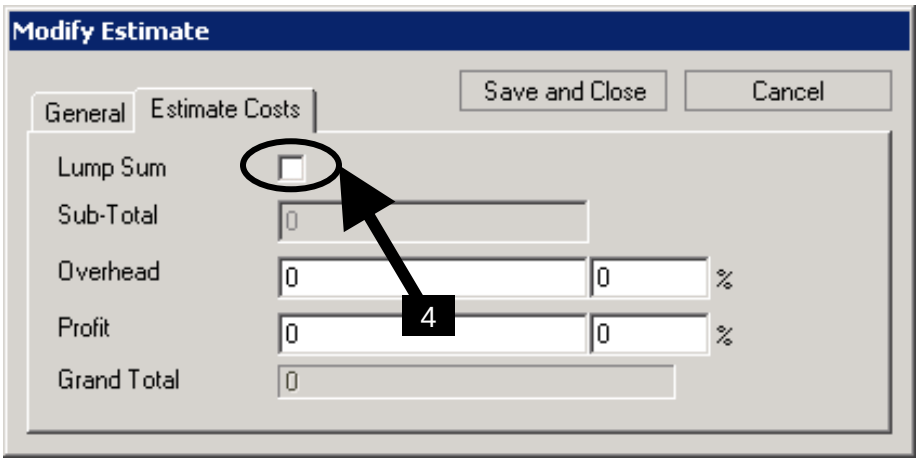
NOTE

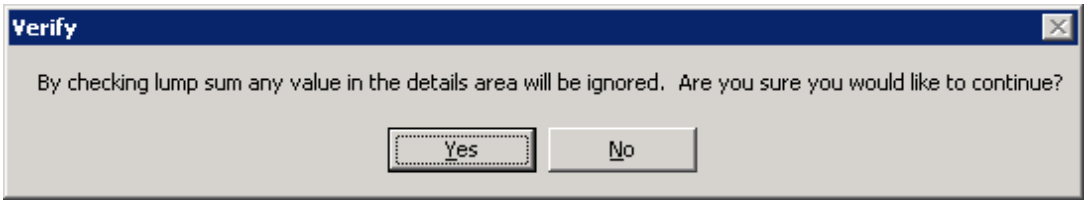
Data Fields with RED labels are required fields. They must have data input to be able to Save and Close.

3) Next, choose the 'ESTIMATE COSTS' tab within the 'ADD ESTIMATE' window.
4) Select the check box next to lump sum then click 'YES' when prompted by the 'VERIFY' window.

TIP

The user can use the Lump Sum feature to add estimates that are received from an independent source.

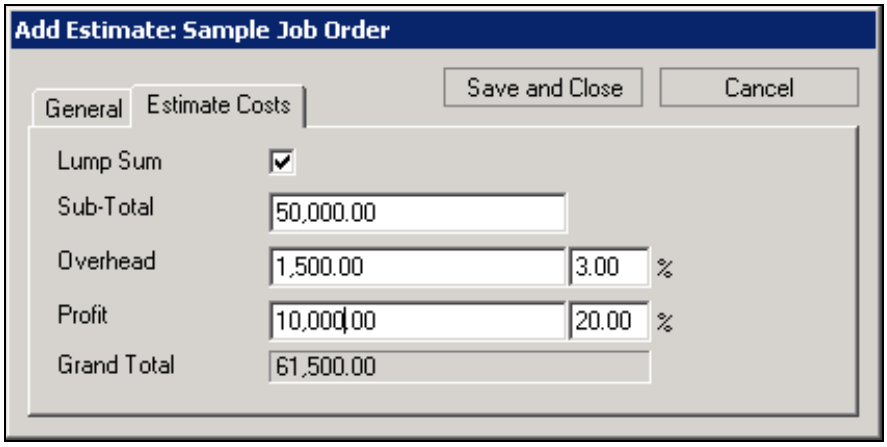




NOTE

Either the percent of overhead & profit, or the actual dollar value of overhead & profit can be entered. PROGEN will calculate either.

5) Enter sub-total, overhead and profit in the spaces provided in the estimate costs tab of the 'ADD ESTIMATE' window.



NOTE

As the estimate changes value the overhead & profit percentages remain the same.

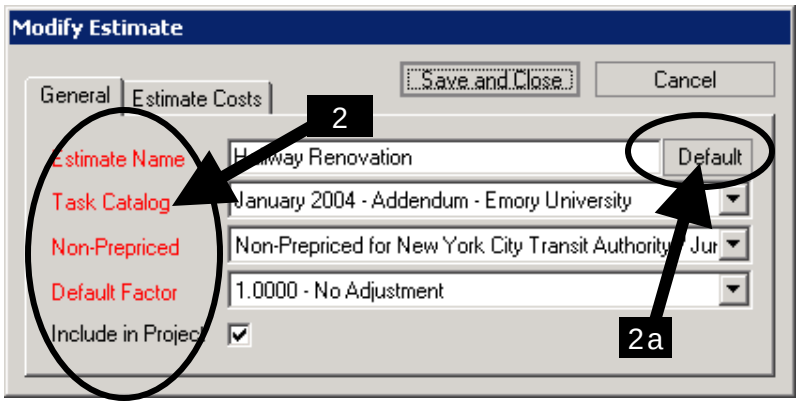
6) Click the 'SAVE AND CLOSE' button.

Detailed Cost Estimate

1) Right click on the 'ESTIMATES' folder, then select 'ADD ESTIMATE'.

2) In the 'ADD ESTIMATE' window, input information for all of the data fields that have red labels.

   a) Click the default button to use job order title entered in for the estimate name.



NOTE

The Construction Task Catalog and the Non-prepriced Catalog are already filled in with the information chosen from the Job Order.

3) The default factor will apply the factor chosen to all tasks within the estimate, unless otherwise indicated.

4) Click the 'SAVE AND CLOSE' button.

5) Double click on 'ESTIMATES' to view the estimate that was created in the previous step on the 'TREEVIEW' side of PROGEN.

6) Double click on the estimate name on the 'TREEVIEW' side to view the estimate details below the estimate on the tree.

7) Select 'ESTIMATE DETAILS', to open the estimate details grid.

Customizing the 'Estimate Details' Grid

1) Click on 'ESTIMATE DETAILS', to open the estimate details grid.

   a) To resize a column, move the mouse to the column header divider line. The pointer will become a double sided arrow. Click and hold the left mouse button to resize the column to the width desired.

   b) The bottom of the grid display has blue action links that manage data within the grid. Hold the mouse arrow over any blue action link to get an explanation of what it does.

   c) The tasks are color coded to differentiate between task types:

      i) See the 'COLOR KEY' action link on the grid

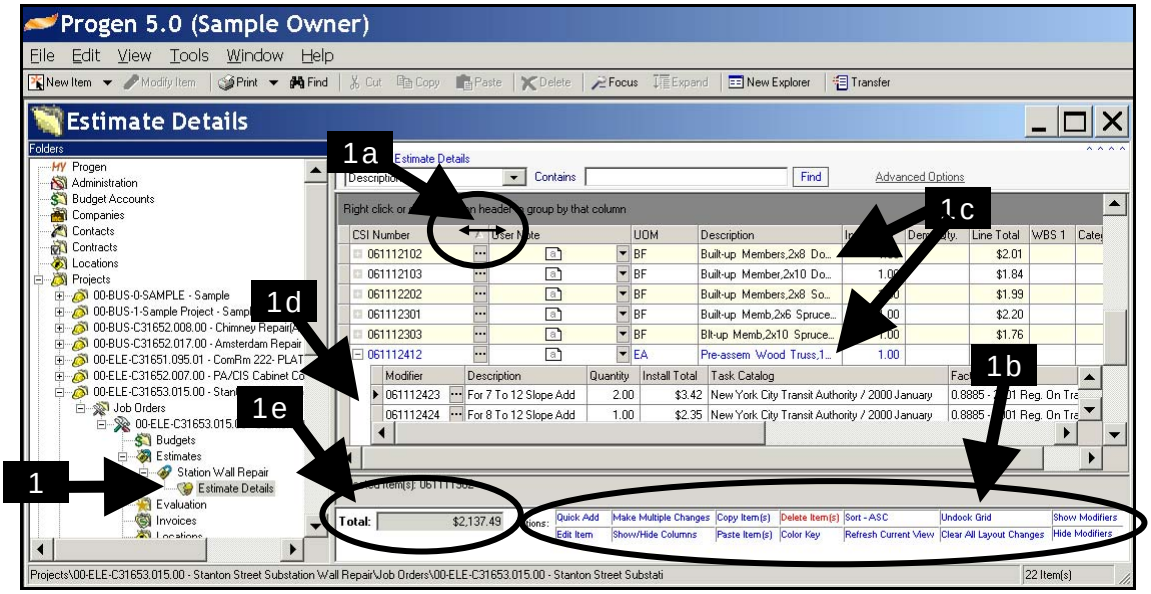
      ii) Black tasks are tasks without modifiers.

      iii) Blue tasks are tasks with modifiers.

      iv) Green tasks are tasks from a Non-Gordian book, or Non-Prepriced tasks.

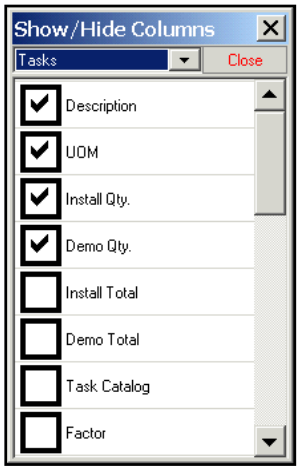
   d) Modifiers are indented for ease of recognition, but are not expanded by default when the grid is opened.

   e) The **Total** field shows the sum of all tasks' line totals.



2) A helpful feature of the details grid is the ability of the 'SHOW/HIDE COLUMNS' action link at the bottom of the window. Click this link to open a 'SHOW/HIDE COLUMNS' panel. Uncheck the columns to hide. When a column is hidden, information is not lost. Some columns may not be critical in building an estimate.

3) Tasks can be sorted by clicking on any column header. The tasks will sort first by ascending alpha-numeric order, then (if the header is clicked again) by descending alpha-numeric order. The default order of tasks, if no sort is selected, is by the order that the task was entered into PROGEN. To sort by date/time entered, select the 'SORT – ASC' action link.



TIP

Suggested columns to show in the estimate grid are:

- CSI NUMBER
- UOM
- DESCRIPTION
- INSTALL QTY.
- DEMO QTY.
- LINE TOTAL
- WBS 1(if applicable)
- CATEGORY 1 (if applicable)
- USER NOTE

Any column can be dragged to move it to the desired location on the header.

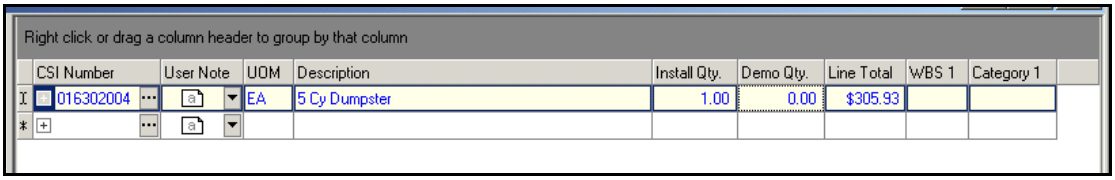
Building a Estimate

1) Enter tasks directly on grid

   a) Open the estimate details grid. Click in the bottom empty cell under the CSI number column header and enter the CSI Number as shown below. Click the 'TAB' key on the keyboard to move the cursor to the next field. The task information will auto fill based on the CSI number.

   b) Add the Install or Demo Quantity in its appropriate field.

   c) Repeat this step until all applicable tasks have been added.



✓ NOTE

There are 4 ways to add tasks to an estimate:

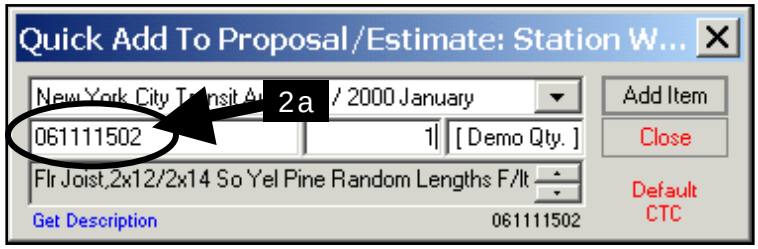
1. Enter a task directly to the GRID
2. Quick Add
3. Drag and Drop
4. Copy and Paste from another estimate

2) Another way to enter a CSI number is to click on the 'QUICK ADD' action link at the bottom of the window. This will open the 'QUICK ADD window.

   a) Click in the 'CSI NUMBER' field and enter a number.

   b) Tab or click to add information to the quantity field.

      (1) Clicking on the 'GET DESCRIPTION' action link will display the description of that task.



   c) Click the 'ADD ITEM' button to add the task to the estimate.

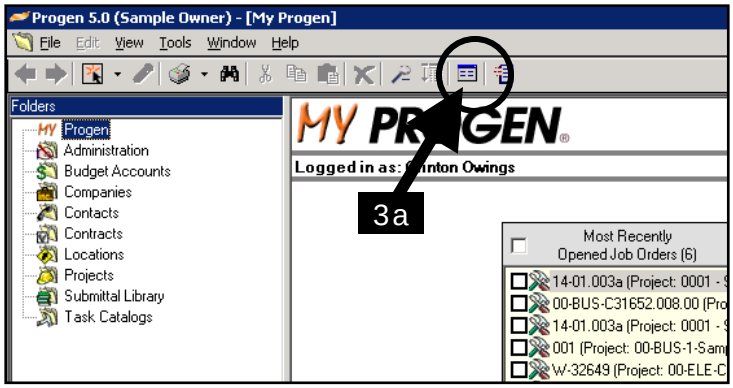
      (1) The 'QUICK ADD' window will remain the front window and the information fields will reset. The task is added to the grid and displayed in the background.

   d) Repeat steps a – c until all applicable tasks have been added.

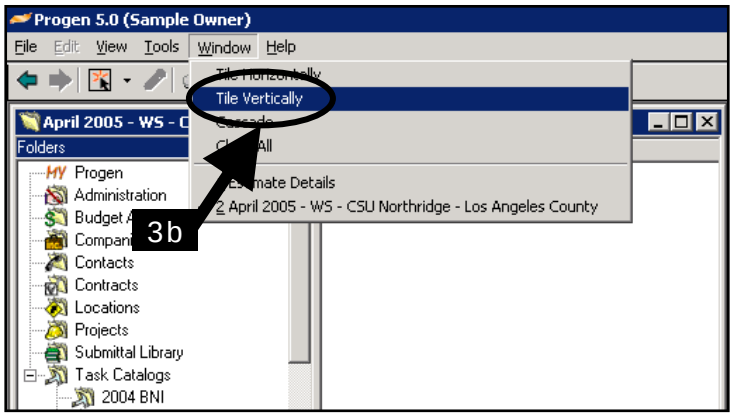
   e) When all tasks have been added, click the 'CLOSE' button.

3) Tasks can be dragged and dropped from the Construction Task Catalog or Non-Gordian Catalog into the 'ESTIMATE DETAILS' to help quickly populate the estimate with tasks. All tasks will be entered into 'ESTIMATE DETAILS' with "0" quantity and the default factor applied.

   a) Open a new explorer window by selecting the 'NEW WINDOW' icon



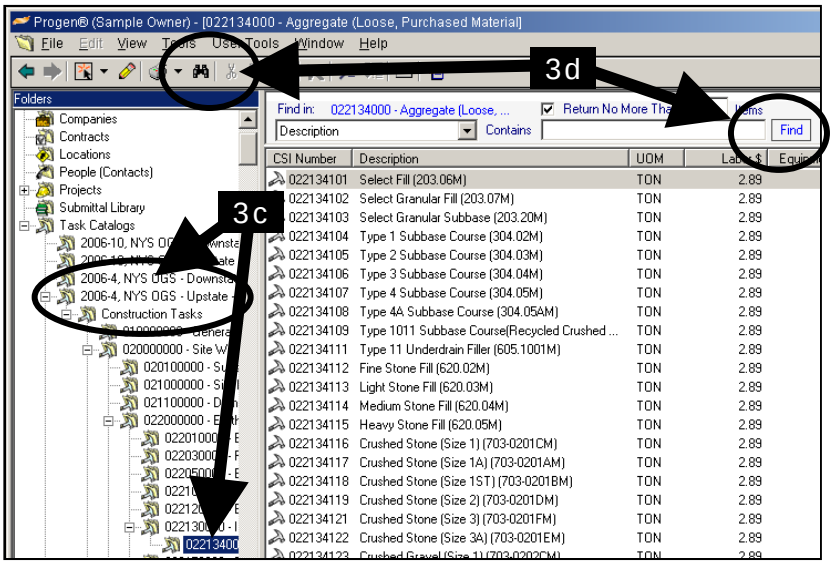
b) To view both windows select 'WINDOW / TILE VERTICALLY' from the menu bar. Or, to work top to bottom, select "WINDOW / TILE HORIZONTALLY'.



✓ NOTE

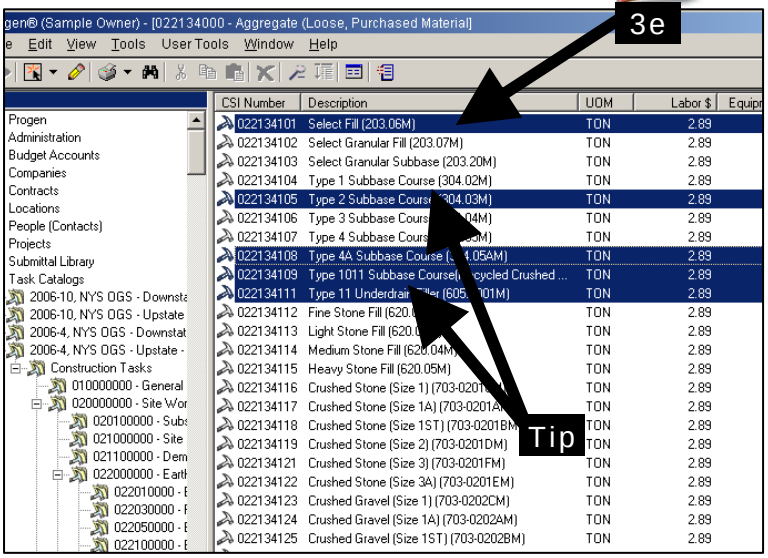
Tiling the window vertically or horizontally is a personal preference. The drag and drop feature will work either way, and will also work without opening additional windows.

c) Expand the 'TASK CATALOG' folder in the 'TREEVIEW' until the section is displayed. Drill down into the sub-section that the item is located in by double-clicking on the Section, followed by the sub-section and the 'LISTVIEW' side will show the tasks in that section.


Progen® (Sample Owner) - [022134000 - Aggregate (Loose, Purchased Material]
File Edit View Tools Window Help
Folders
Companies
Contracts
Locations
People (Contacts)
Projects
Submittal Library
Task Catalogs
Construction Tasks
Find in: 022134000 - Aggregate (Loose, ...
Description
Contains
Find
CSI Number
Description
UOM
022134101 Select Fill (203.06M) TON 2.89
022134102 Select Granular Fill (203.07M) TON 2.89
022134103 Select Granular Subbase (203.20M) TON 2.89
022134104 Type 1 Subbase Course (304.02M) TON 2.89
022134105 Type 2 Subbase Course (304.03M) TON 2.89
022134106 Type 3 Subbase Course (304.04M) TON 2.89
022134107 Type 4 Subbase Course (304.05M) TON 2.89
022134108 Type 4A Subbase Course (304.05AM) TON 2.89
022134109 Type 1011 Subbase Course(Recycled Crushed ... TON 2.89
022134111 Type 11 Underdrain Filler (605.1001M) TON 2.89
022134112 Fine Stone Fill (620.02M) TON 2.89
022134113 Light Stone Fill (620.03M) TON 2.89
022134114 Medium Stone Fill (620.04M) TON 2.89
022134115 Heavy Stone Fill (620.05M) TON 2.89
022134116 Crushed Stone (Size 1) (703-0201CM) TON 2.89
022134117 Crushed Stone (Size 1A) (703-0201AM) TON 2.89
022134118 Crushed Stone (Size 1ST) (703-0201BM) TON 2.89
022134119 Crushed Stone (Size 2) (703-0201DM) TON 2.89
022134121 Crushed Stone (Size 3) (703-0201FM) TON 2.89
022134122 Crushed Stone (Size 3A) (703-0201EM) TON 2.89
3c
3d

d) To search for a specific task, click on the 'FIND' button. The find section will open and a word or phrase can be entered to locate the task desired.

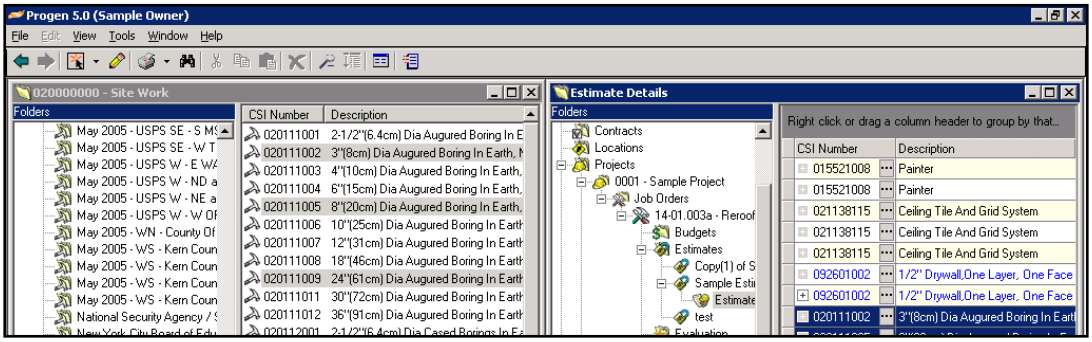
e) Click on a task to select it.



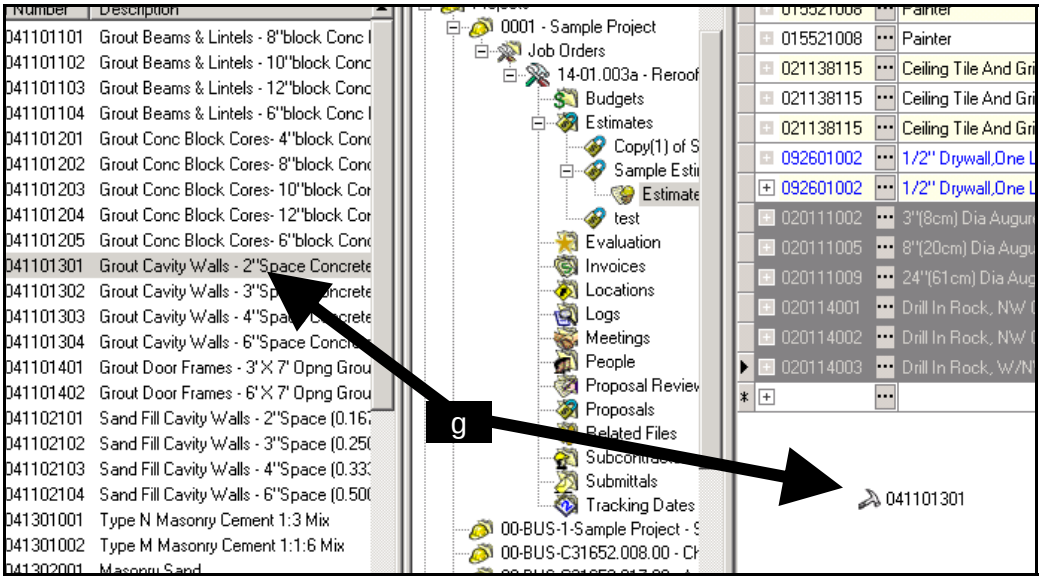
TIP

Click and hold the 'CTRL' key and click on another task to select multiple tasks.

f) The PROGEN Work Area should have the 'ESTIMATE DETAILS' displayed on one side and the 'TASK CATALOG' displayed on the other (unless the horizontal display was chosen).



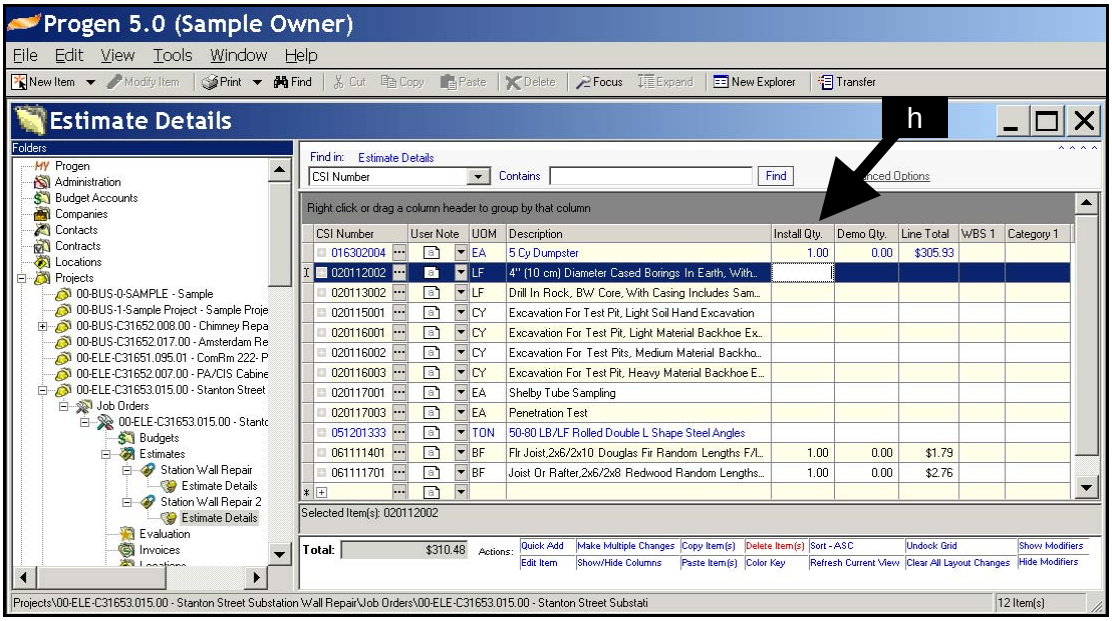
g) Left click and hold on the highlighted task(s). Move the mouse over the 'ESTIMATE DETAILS' folder or the grid. If the cursor is located above an acceptable drop location a plus sign will appear beside the arrow. Release the mouse button to drop the task(s) onto the estimate. The task(s) is (are) now copied to this estimate with a "0" quantity and the default factor applied.



TIP

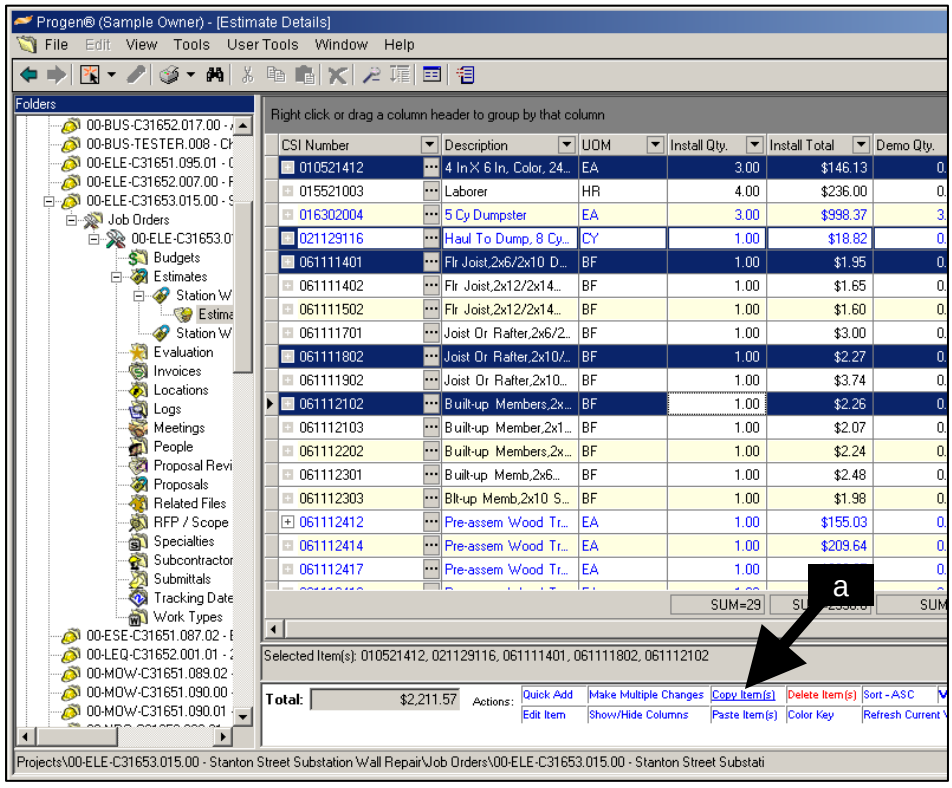
The tasks will drop only when a 'PLUS SIGN' appears next to the mouse arrow when tasks are dragged and dropped.

h) Enter the quantities and other information as applicable for each task.

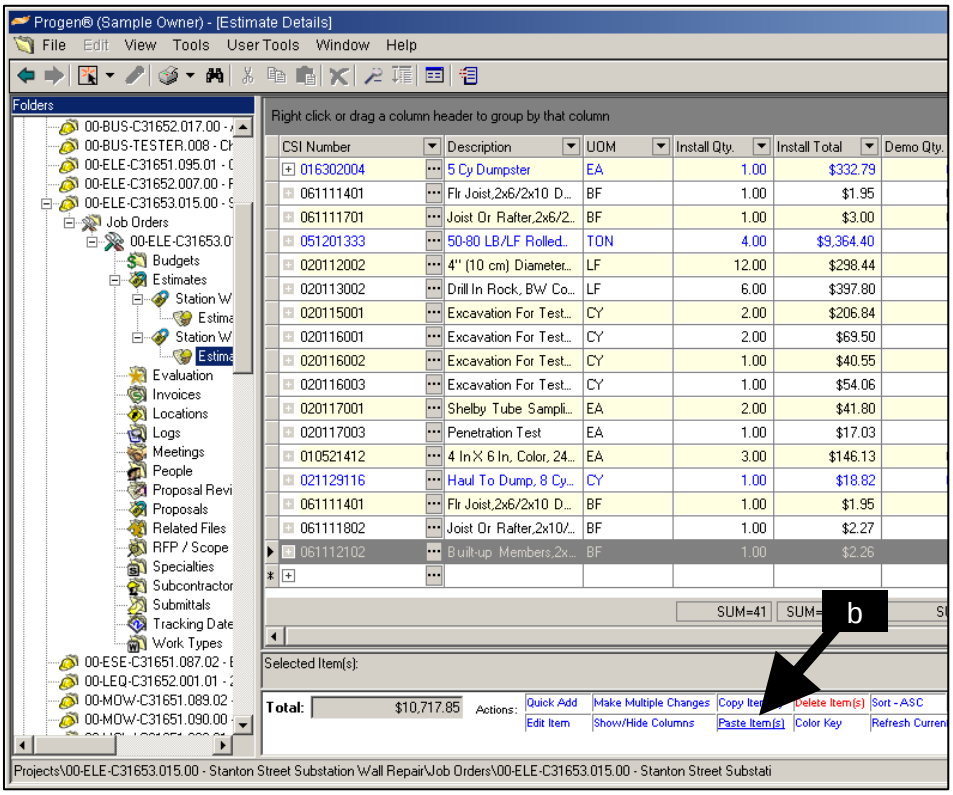

Progen 5.0 (Sample Owner)
File Edit View Tools Window Help
Estimate Details
h
Right click or drag a column header to group by that column
CSI Number
User Note
UOM
Description
Install Qty.
Demo Qty.
Line Total
WBS 1
Category 1
016302004 EA 5 Cy Dumpster 1.00 0.00 $305.93
020112002 LF 4" (10 cm) Diameter Cased Borings In Earth, With...
020113002 LF Drill In Rock, BW Core, With Casing Includes Sam...
020115001 CY Excavation For Test Pit, Light Soil Hand Excavation
020116001 CY Excavation For Test Pit, Light Material Backhoe Ex...
020116002 CY Excavation For Test Pits, Medium Material Backho...
020116003 CY Excavation For Test Pit, Heavy Material Backhoe E...
020117001 EA Shelby Tube Sampling
020117003 EA Penetration Test
051201333 TON 50-80 LB/LF Rolled Double L Shape Steel Angles
061111401 BF Flr Joist,2x6/2x10 Douglas Fir Random Lengths F/I... 1.00 0.00 $1.79
061111701 BF Joist Or Rafter,2x6/2x8 Redwood Random Lengths... 1.00 0.00 $2.76
Selected Item(s): 020112002
Total: $310.48
Actions: Quick Add Make Multiple Changes Copy Item(s) Delete Item(s) Sort - ASC Undock Grid Show Modifiers
Edit Item Show/Hide Columns Paste Item(s) Color Key Refresh Current View Clear All Layout Changes Hide Modifiers
Projects\00-ELE-C31653.015.00 - Stanton Street Substation Wall Repair\Job Orders\00-ELE-C31653.015.00 - Stanton Street Substati
12 Item(s)

4. Copy and Paste from another estimate

a) Go into the Estimate Details grid of a previous estimate that contains the same line items to be used in the current one. Highlight the line items desired and click the 'COPY ITEM(S)' action link below the grid.


Progen® (Sample Owner) - [Estimate Details]
File Edit View Tools User Tools Window Help
Right click or drag a column header to group by that column
CSI Number
Description
UOM
Install Qty.
Install Total
Demo Qty.
010521412 4 In X 6 In, Color, 24... EA 3.00 $146.13
015521003 Laborer HR 4.00 $236.00
016302004 5 Cy Dumpster EA 3.00 $998.37
021129116 Haul To Dump, 8 Cy... CY 1.00 $18.82
061111401 Flr Joist,2x6/2x10 D... BF 1.00 $1.95
061111402 Flr Joist,2x12/2x14... BF 1.00 $1.65
061111502 Flr Joist,2x12/2x14... BF 1.00 $1.60
061111701 Joist Or Rafter,2x6/2... BF 1.00 $3.00
061111802 Joist Or Rafter,2x10/... BF 1.00 $2.27
061111902 Joist Or Rafter,2x10... BF 1.00 $3.74
061112102 Built-up Members,2x... BF 1.00 $2.26
061112103 Built-up Member,2x1... BF 1.00 $2.07
061112202 Built-up Members,2x... BF 1.00 $2.24
061112301 Built-up Memb,2x6... BF 1.00 $2.48
061112303 Blt-up Memb,2x10 S... BF 1.00 $1.98
061112412 Pre-assem Wood Tr... EA 1.00 $155.03
061112414 Pre-assem Wood Tr... EA 1.00 $209.64
061112417 Pre-assem Wood Tr... EA 1.00
SUM=29
a
Selected Item(s): 010521412, 021129116, 061111401, 061111802, 061112102
Total: $2,211.57
Actions: Quick Add Make Multiple Changes Copy Item(s) Delete Item(s) Sort - ASC
Edit Item Show/Hide Columns Paste Item(s) Color Key Refresh Current
Projects\00-ELE-C31653.015.00 - Stanton Street Substation Wall Repair\Job Orders\00-ELE-C31653.015.00 - Stanton Street Substati

b) Go to the current estimate and click the 'PASTE ITEM(S)' action link below the grid to paste the copied line items into the current estimate. The copied line items will retain their install/demo quantities and the factor when pasted into the current estimate. The pasted items will appear at the bottom of the estimate.


Progen® (Sample Owner) - [Estimate Details]
File Edit View Tools User Tools Window Help
Folders
Right click or drag a column header to group by that column
CSI Number
Description
UOM
Install Qty.
Install Total
Demo Qty.
016302004 5 Cy Dumpster EA 1.00 $332.79
061111401 Flr Joist,2x6/2x10 D... BF 1.00 $1.95
061111701 Joist Or Rafter,2x6/2... BF 1.00 $3.00
051201333 50-80 LB/LF Rolled... TON 4.00 $9,364.40
020112002 4" (10 cm) Diameter... LF 12.00 $298.44
020113002 Drill In Rock, BW Co... LF 6.00 $397.80
020115001 Excavation For Test... CY 2.00 $206.84
020116001 Excavation For Test... CY 2.00 $69.50
020116002 Excavation For Test... CY 1.00 $40.55
020116003 Excavation For Test... CY 1.00 $54.06
020117001 Shelby Tube Sampli... EA 2.00 $41.80
020117003 Penetration Test EA 1.00 $17.03
010521412 4 In X 6 In, Color, 24... EA 3.00 $146.13
021129116 Haul To Dump, 8 Cy... CY 1.00 $18.82
061111401 Flr Joist,2x6/2x10 D... BF 1.00 $1.95
061111802 Joist Or Rafter,2x10/... BF 1.00 $2.27
061112102 Built-up Members,2x... BF 1.00 $2.26
SUM=41
Selected Item(s):
Total: $10,717.85
Actions:
Quick Add
Make Multiple Changes
Copy Item
Delete Item(s)
Sort - ASC
Edit Item
Show/Hide Columns
Paste Item(s)
Color Key
Refresh Current
b
Projects\00-ELE-C31653.015.00 - Stanton Street Substation Wall Repair\Job Orders\00-ELE-C31653.015.00 - Stanton Street Substati

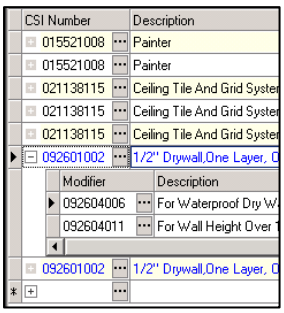
Adding Modifiers to Tasks

NOTE

This is the only way to add modifiers to an estimate.

NOTE

The modifiers are offset in the 'ESTIMATE DETAILS' grid.



Some tasks require a modifier to adjust the price due to special circumstances. Only tasks that are blue in color on the estimate details grid have modifiers available to be added.

1) Select a task to add a modifier to.

2) Open the 'ADD/EDIT DETAIL ITEM' window one of the following ways:

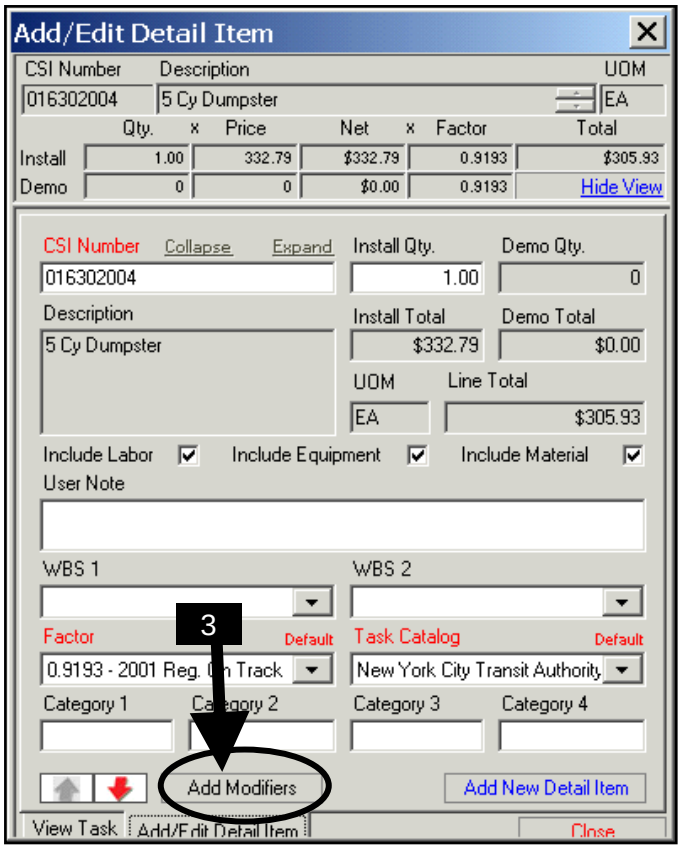
   a) Click on the points of ellipsis "…" to the right of the CSI number.

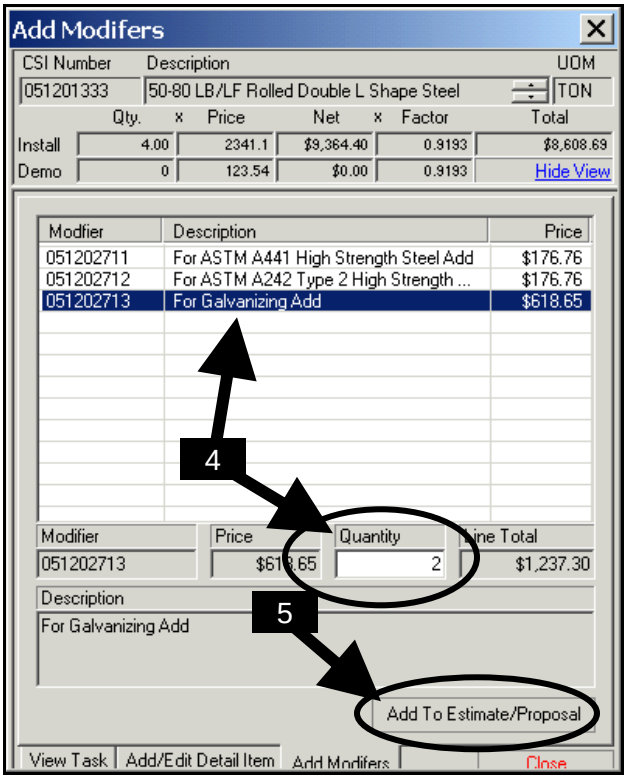
   b) Select a task and click the 'EDIT ITEM' action link.

   c) Double click on a non-editable field (Description, UOM, etc.) of the task to be modified.

3) Click the 'ADD MODIFIERS' button at the bottom of the 'ADD/EDIT DETAIL ITEM' window to show the 'ADD MODIFIER' tab of this window.

4) Select the Modifier and add the quantity.



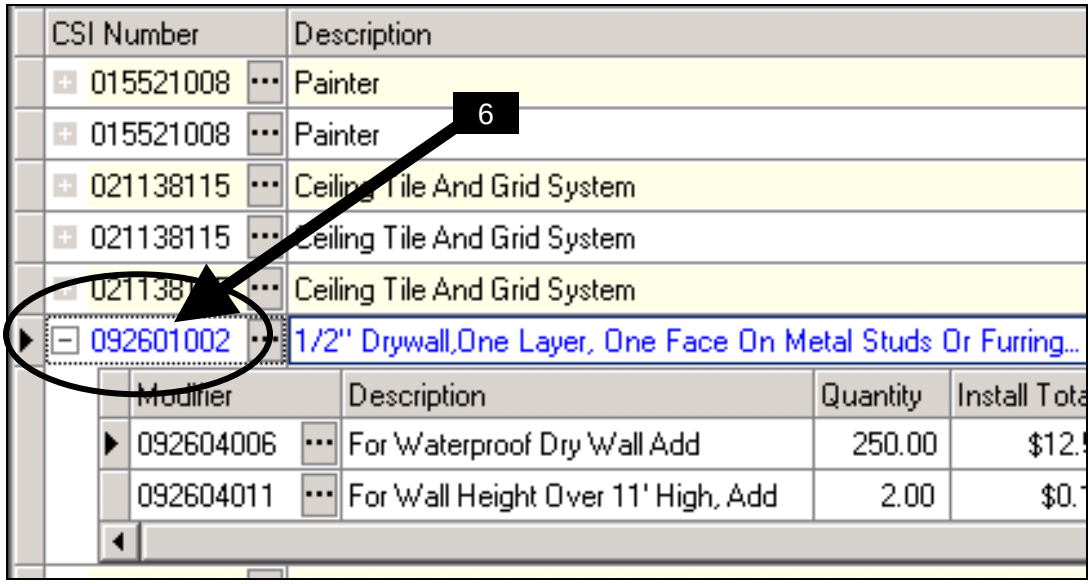


5) Click the 'ADD TO ESTIMATE/ PROPOSAL' button to add the modifier to the estimate. The selected modifier disappears from the list.

6) Close the 'ADD/EDIT DETAIL ITEM' window when all applicable modifiers have been added. The task now has a modifier listed below it and offset to the right on the estimate details grid. The modifier can be hidden by clicking the 'MINUS SIGN' to the left of the CSI number. Conversely, the modifier can be expanded when hidden by clicking the 'PLUS SIGN'.

NOTE

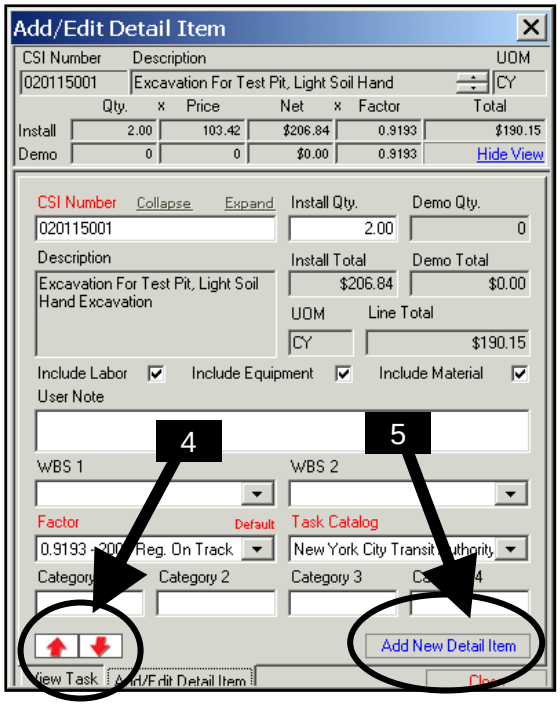
Modifiers are hidden by default when first opening the estimate details grid.



Using the 'Add/Edit Detail Item' Window

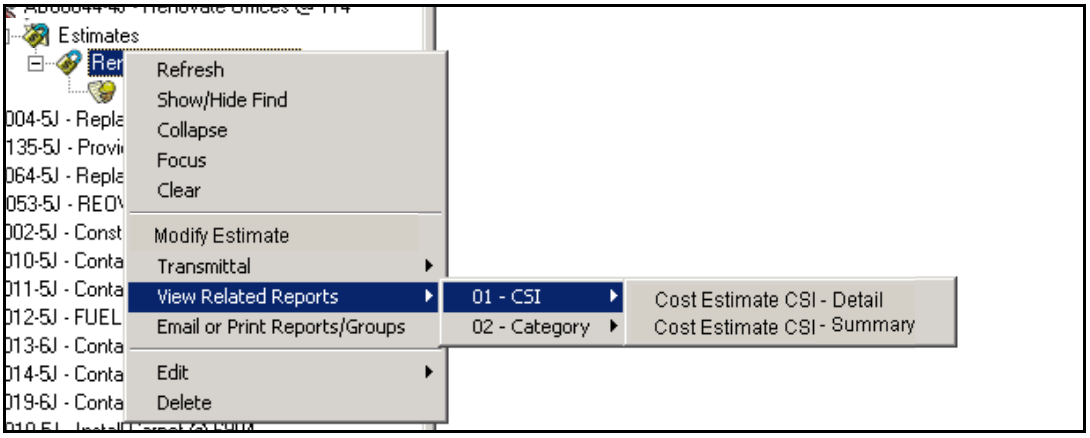
The 'ADD/EDIT DETAIL ITEM' window displays all the task information for a single task.

1) Open the 'ADD/EDIT DETAIL ITEM' window one of the following ways:
   a) Click on the points of ellipsis "…" to the right of the CSI number.
   b) Select a task and click the 'EDIT ITEM' action link.
   c) Double click on a non-editable field (Description, UOM, etc.) of the task to be modified.
2) Changes can be made here too, just like on the grid. Select the 'VIEW TASK' tab to see more details about the task including LEM cost and notes.
3) The 'RED ARROWS' on the bottom left enable scrolling through the list of tasks.
4) Click the 'ADD NEW DETAIL ITEM' button to add additional construction tasks using this window.
5) Click the 'CLOSE' button when finished.



Printing the Estimate

1. Right click on the estimate and select: "VIEW RELATED REPORTS"
   a. '01 – CSI / COST ESTIMATE CSI - DETAIL'
      i. The report develops using task detail grouped by the CSI Section.
   b. '01 – CSI / COST ESTIMATE CSI - SUMMARY'
      i. The report develops using the summary total for each CSI Section.



NOTE

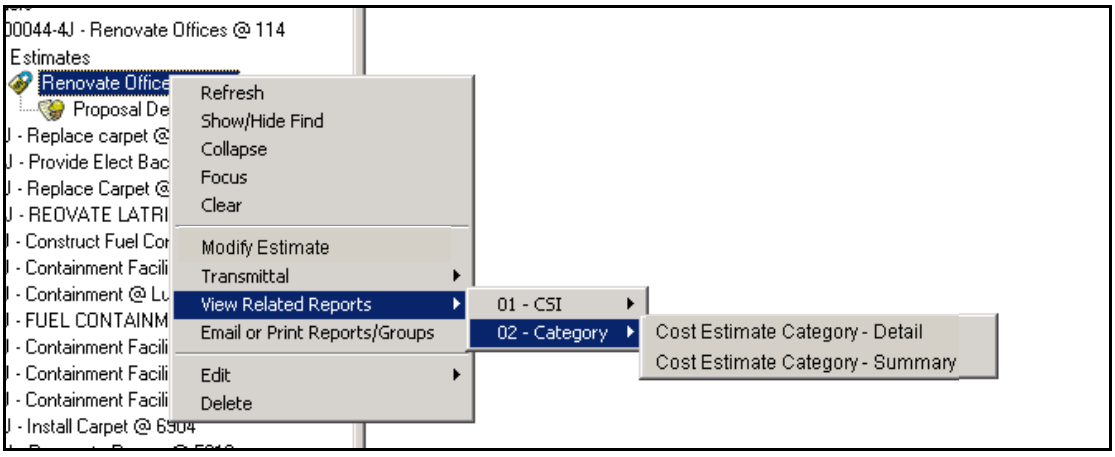
Printing in Progen is very customized. The report groups/names may be different than those mentioned here.

c. ’02 – CATEGORY / COST ESTIMATE CATEGORY - DETAIL’

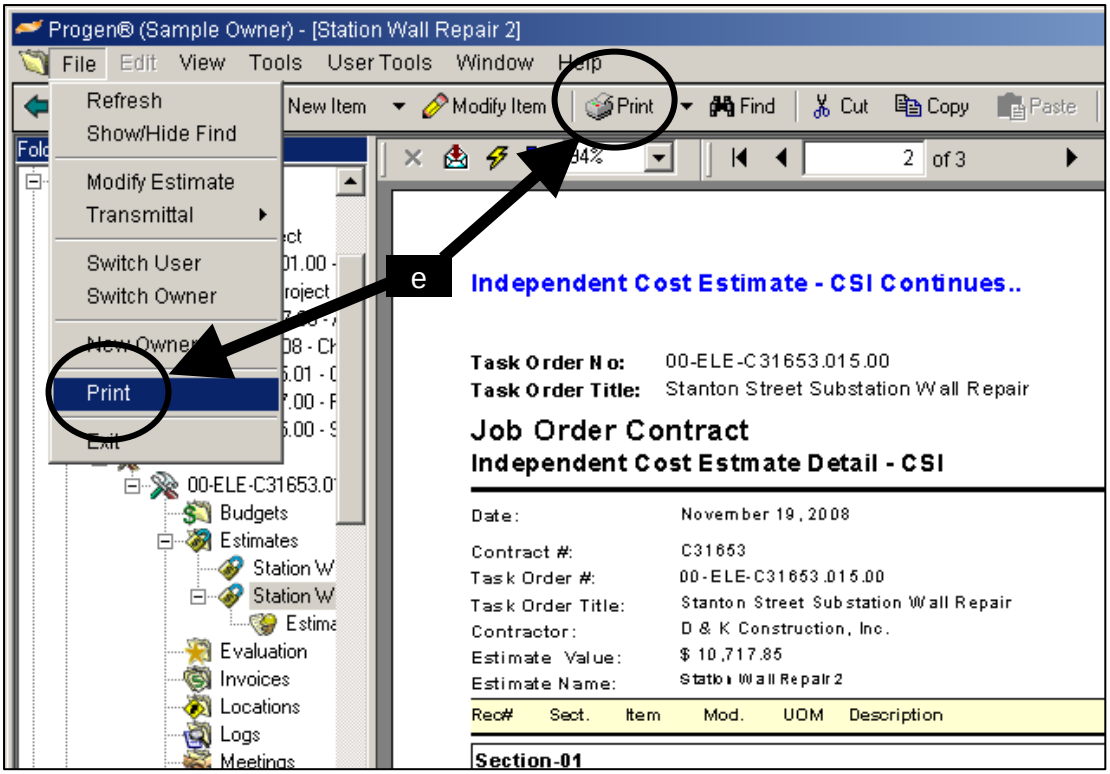
   i. The report develops using task detail grouped by the category.

d. ‘02 – CATEGORY COST ESTIMATE CATEGORY - SUMMARY’

   i. The report develops using the summary total for each category.



e. Once the report is previewed, click the printer icon or ‘FILE/PRINT’ to send the report to the default printer. Previewing the report limits the number of errors that may possibly appear on the report due to lack of or incorrect information.



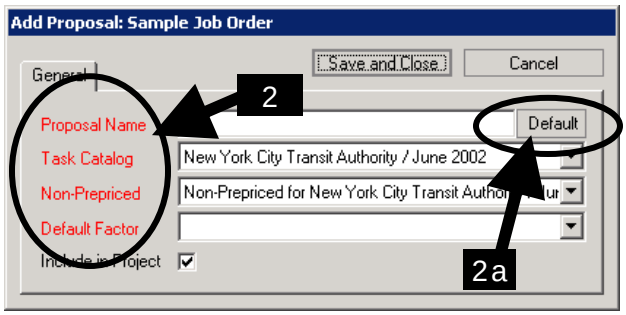
Part IV – Proposal Package

Chapter 9 - Creating a Proposal

Within the Job Order folder, there is an 'ESTIMATES' Folder and a 'PROPOSAL' Folder. Estimates are for the OWNERS' USE and PROPOSALS are for the CONTRACTORS' USE. As with most PROGEN functions, there are several ways to build a proposal. This guide will demonstrate the easiest and/or most commonly used; there may be other ways to perform some of the same functions demonstrated as follows.

Adding a Proposal

1) Right click on the 'PROPOSALS' folder, then select 'ADD PROPOSAL'.
2) In the 'ADD PROPOSAL' window, input information for all of the data fields that have red labels.
   a) Click the default button to use job order title entered in for the proposal name.
3) The default factor will apply the factor chosen to all tasks within the proposal, unless otherwise indicated.
4) Click the 'SAVE AND CLOSE' button.



> ✓ NOTE
>
> The Construction Task Catalog and the Non-Prepriced Catalog are already filled in with the information chosen from the Job Order.

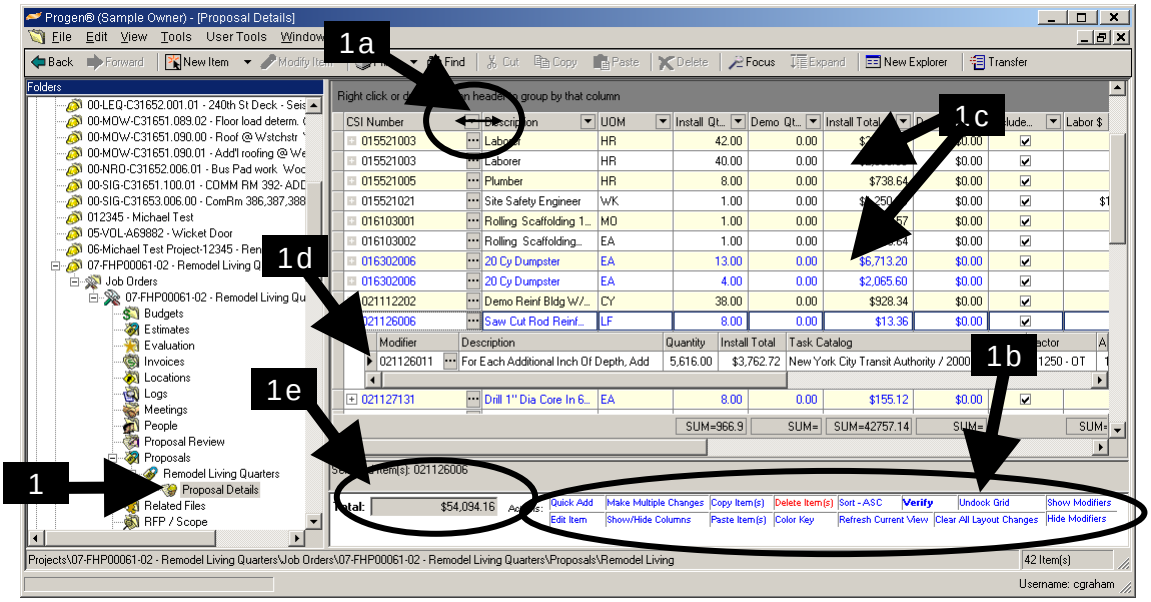
5) Double click on 'PROPOSALS' to view the proposal that was created in the previous step on the 'TREEVIEW' side of PROGEN.
6) Double click on the proposal name on the 'TREEVIEW' side to view the proposal details below the proposal on the tree.
7) Select 'PROPOSAL DETAILS', to open the proposal details grid.

Customizing the 'Proposal Details' Grid

1) Click on 'PROPOSAL DETAILS', to open the proposal details grid.
   a) To resize a column, move the mouse to the column header divider line. The pointer will become a double sided arrow. Click and hold the left mouse button to resize the column to the width desired.
   b) The bottom of the grid display has blue action links that manage data within the grid. Hold the mouse arrow over any blue action link to get an explanation of what it does.
   c) The tasks are color coded to differentiate between task types:
      i) See the 'COLOR KEY' action link on the grid
      ii) Black tasks are tasks without modifiers.
      iii) Blue tasks are tasks with modifiers.
      iv) Green tasks are tasks from a Non-Gordian book, or Non-Prepriced tasks.

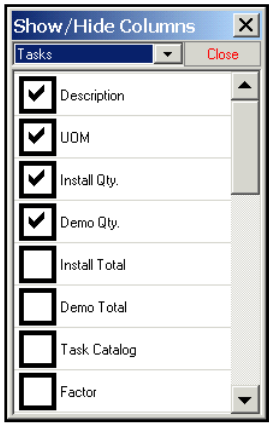
d) Modifiers are indented for ease of recognition, but are not expanded by default when the grid is opened.

e) The **Total** field shows the sum of all tasks' line totals.



2) A helpful feature of the details grid is the ability of the 'SHOW/HIDE COLUMNS' action link at the bottom of the window. Click this link to open a 'SHOW/HIDE COLUMNS' panel. Uncheck the columns to hide. When a column is hidden, information is not lost. Some columns may not be critical in building a proposal.

3) Tasks can be sorted by clicking on any column header. The tasks will sort first by ascending alpha-numeric order, then (if the header is clicked again) by descending alpha-numeric order. The default order of tasks, if no sort is selected, is by the order that the task was entered into PROGEN. To sort by date/time entered, select the 'SORT – ASC' action link.



TIP

Suggested columns to show in the proposal grid are:

- CSI NUMBER
- UOM
- DESCRIPTION
- INSTALL QTY.
- DEMO QTY.
- LINE TOTAL
- WBS 1(if applicable)
- CATEGORY 1 (if applicable)
- USER NOTE

Any column can be dragged to move it to the desired location on the header.

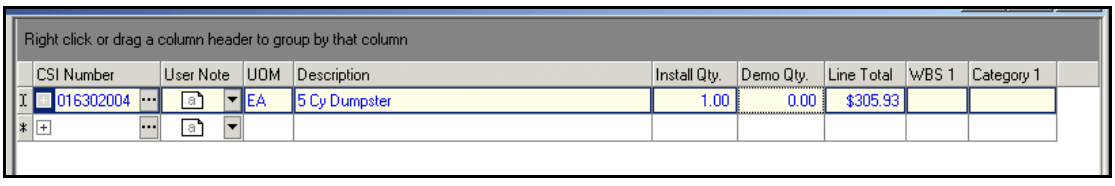
Building a Proposal

1) Enter tasks directly on grid

a) Open the proposal details grid. Click in the bottom empty cell under the CSI number column header and enter the CSI Number as shown below. Click the 'TAB' key on the keyboard to move the cursor to the next field. The task information will auto fill based on the CSI number.

b) Add the Install or Demo Quantity in its appropriate field.

c) Repeat this step until all applicable tasks have been added.



✓ NOTE

There are 4 ways to add tasks to a proposal:

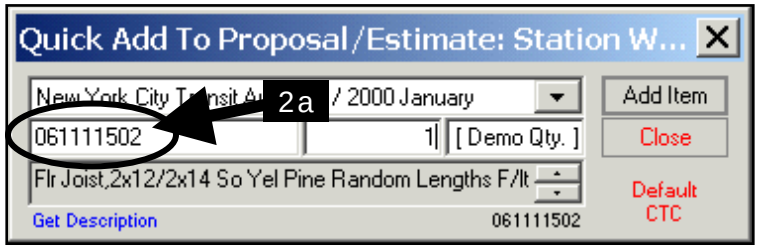
1. Enter a task directly to the GRID
2. Quick Add
3. Drag and Drop
4. Copy and Paste from another proposal

2) Another way to enter a CSI number is to click on the 'QUICK ADD' action link at the bottom of the window. This will open the 'QUICK ADD window.

a) Click in the 'CSI NUMBER' field and enter a number.

b) Tab or click to add information to the quantity field.

(1) Clicking on the 'GET DESCRIPTION' action link will display the description of that task.



c) Click the 'ADD ITEM' button to add the task to the proposal.

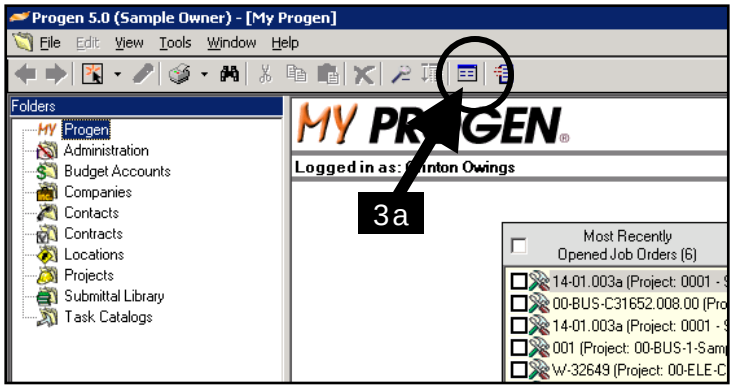
(1) The 'QUICK ADD' window will remain the front window and the information fields will reset. The task is added to the grid and displayed in the background.

d) Repeat steps a – c until all applicable tasks have been added.

e) When all tasks have been added, click the 'CLOSE' button.

3) Tasks can be dragged and dropped from the Construction Task Catalog or Non-Gordian Catalog into the 'PROPOSAL DETAILS' to help quickly populate the proposal with tasks. All tasks will be entered into 'PROPOSAL DETAILS' with "0" quantity and the default factor applied.

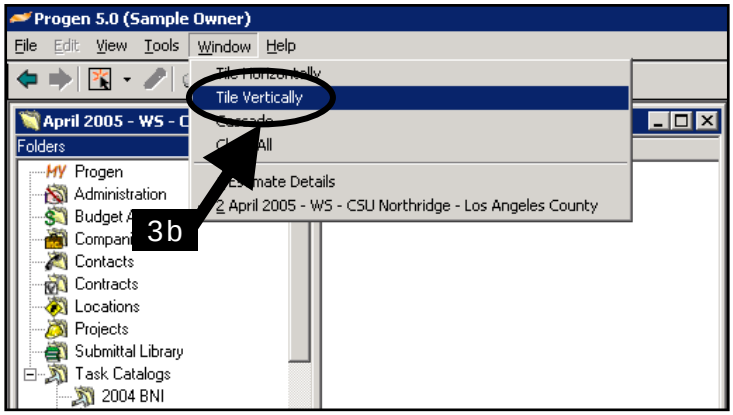
a) Open a new explorer window by selecting the 'NEW WINDOW' icon



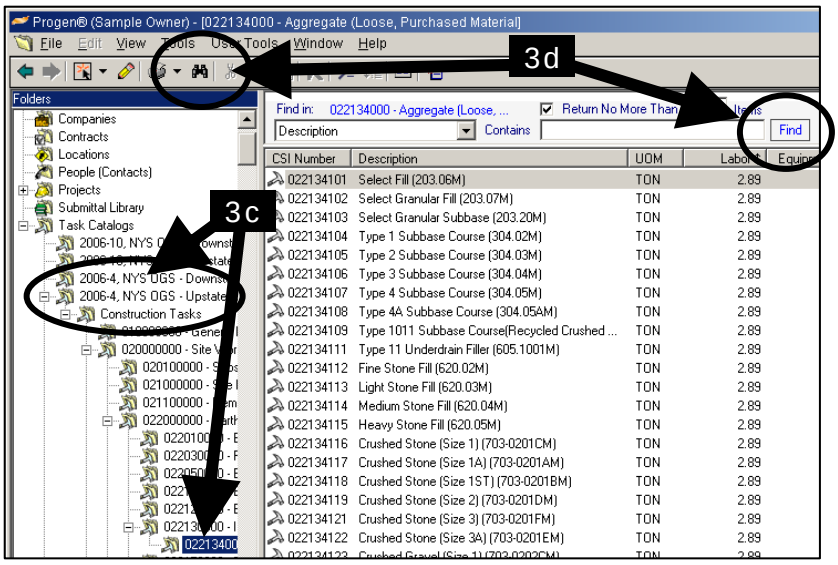
✓ NOTE

Tiling the window vertically or horizontally is a personal preference. The drag and drop feature will work either way, and will also work without opening additional windows.

b) To view both windows select 'WINDOW / TILE VERTICALLY' from the menu bar. Or, to work top to bottom, select "WINDOW / TILE HORIZONTALLY'.

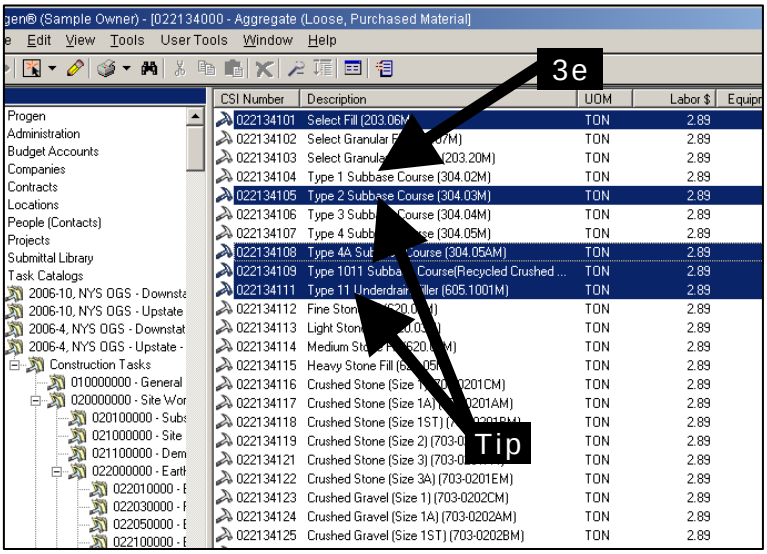


c) Expand the 'TASK CATALOG' folder in the 'TREEVIEW' until the section is displayed. Drill down into the sub-section that the item is located in by double-clicking on the section, followed by the sub-section and the 'LISTVIEW' side will show the tasks in that section.



d) To search for a specific task, click on the 'FIND' button. The find section will open and a word or phrase can be entered to locate the task desired.

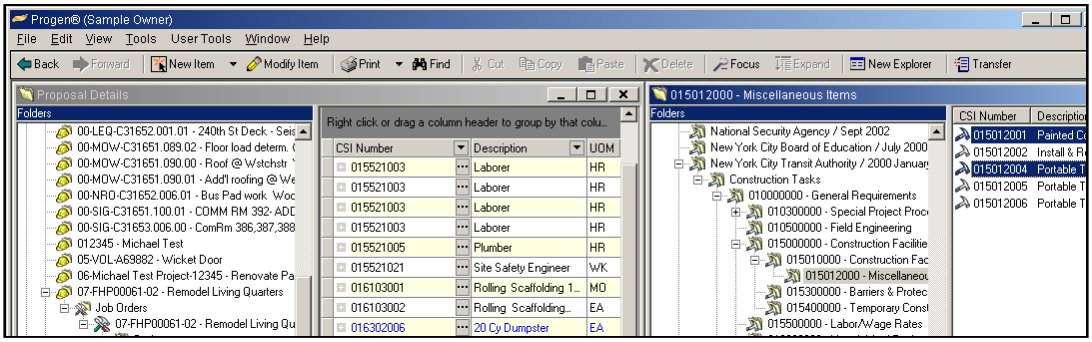
e) Click on a task to select it.



TIP

Click and hold the 'CTRL' key and click on another task to select multiple tasks.

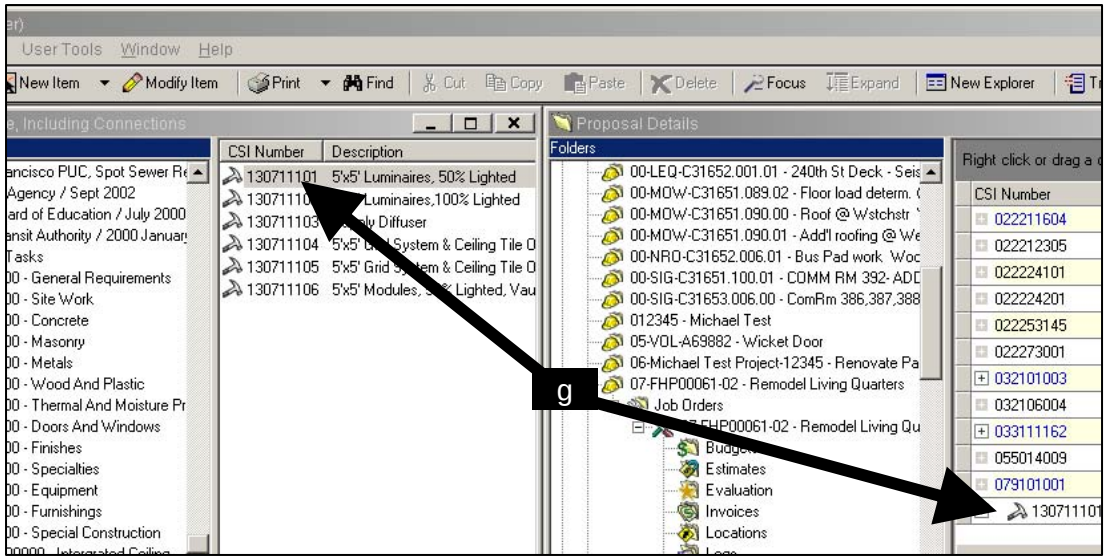
f) The PROGEN Work Area should have the 'PROPOSAL DETAILS' displayed on one side and the 'TASK CATALOG' displayed on the other (unless the horizontal display was chosen).



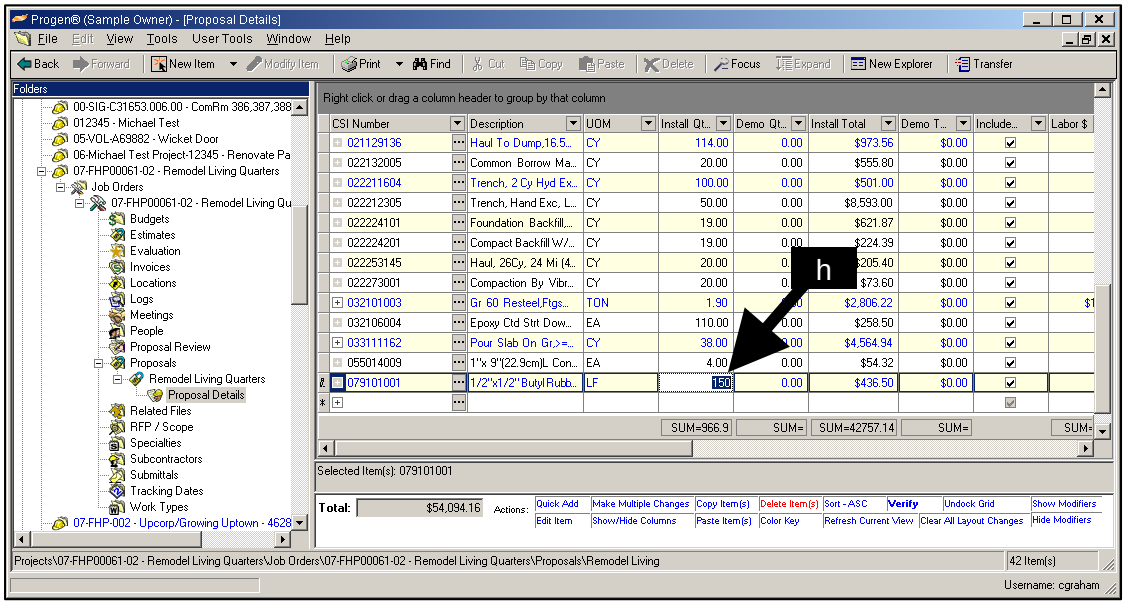
g) Left click and hold on the highlighted task(s). Move the mouse over the 'PROPOSAL DETAILS' folder or the grid. If the cursor is located above an acceptable drop location a plus sign will appear beside the arrow. Release the mouse button to drop the task(s) onto the proposal. The task(s) is (are) now copied to this proposal with a "0" quantity and the default factor applied.

TIP

The tasks will drop only when a 'PLUS SIGN' appears next to the mouse arrow when tasks are dragged and dropped.

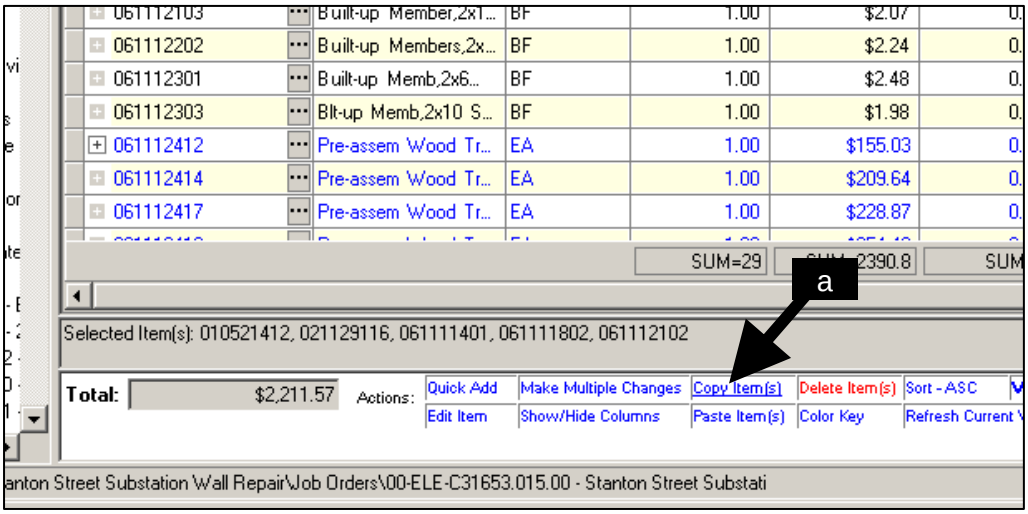


h) Enter the quantities and other information as applicable for each task.

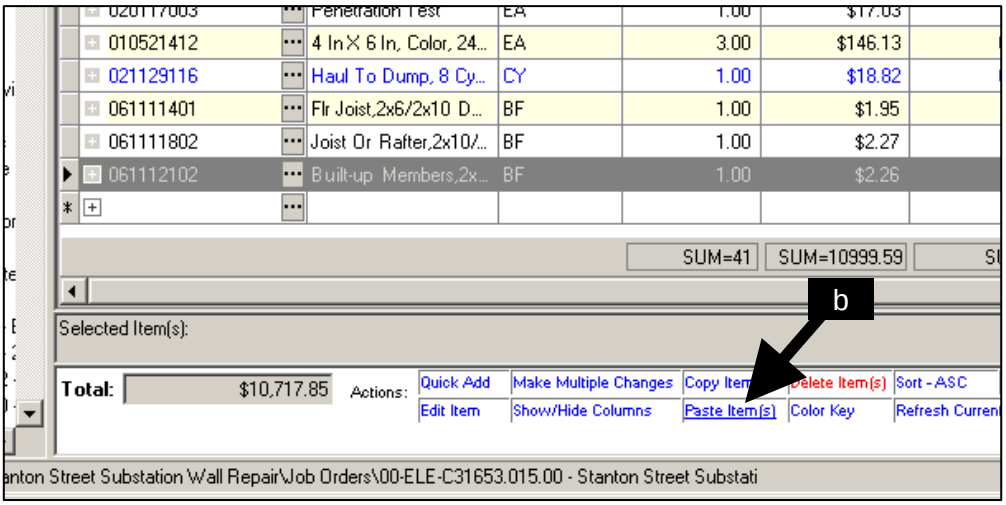


4. Copy and Paste from another proposal

a) Go into the Proposal Details grid of a previous proposal that contains the same line items to be used in the current one. Highlight the line items desired and click the 'COPY ITEM(S)' action link below the grid.



b) Go to the current proposal and click the 'PASTE ITEM(S)' action link below the grid to paste the copied line items into the current proposal. The copied line items will retain their install/demo quantities and the factor when pasted into the current proposal. The pasted items will appear at the bottom of the proposal.



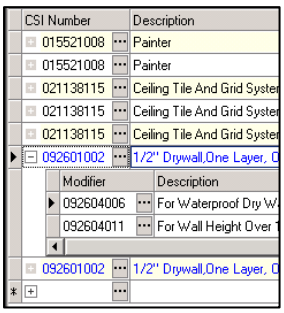
Adding Modifiers to Tasks

NOTE

This is the only way to add modifiers to a proposal.

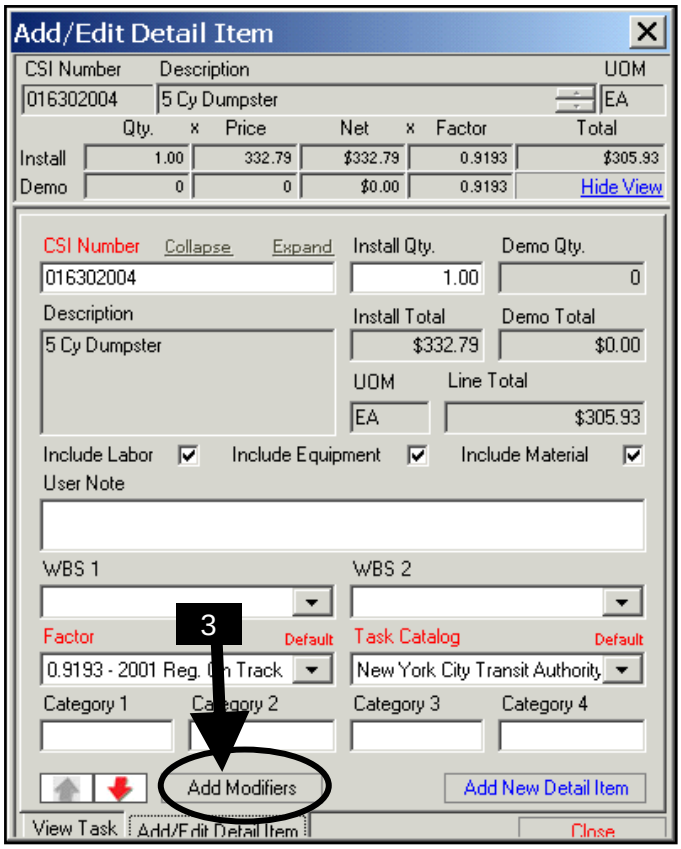
NOTE

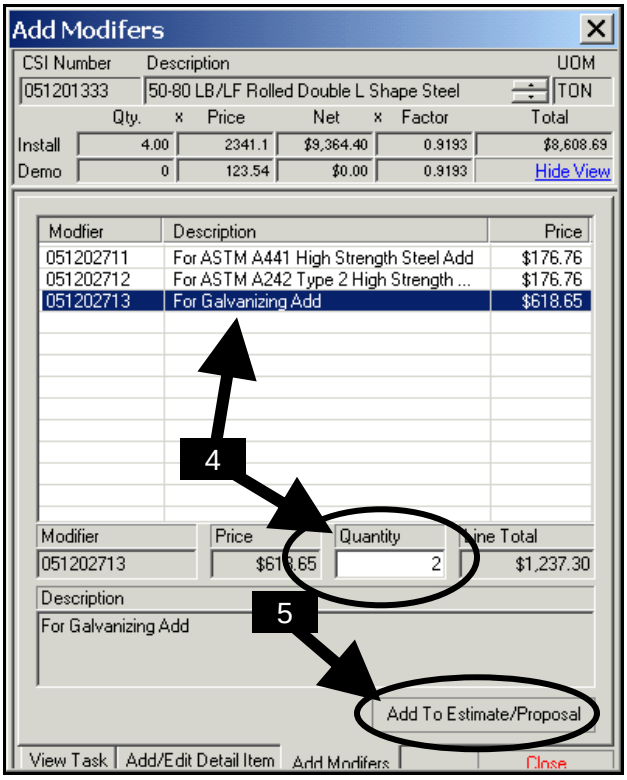
The modifiers are offset in the 'PROPOSAL DETAILS' grid.



Some tasks require a modifier to adjust the price due to special circumstances. Only tasks that are blue in color on the proposal details grid have modifiers available to be added.

1) Select a task to add a modifier to.
2) Open the 'ADD/EDIT DETAIL ITEM' window one of the following ways:
   a) Click on the points of ellipsis "…" to the right of the CSI number.
   b) Select a task and click the 'EDIT ITEM' action link.
   c) Double click on a non-editable field (Description, UOM, etc.) of the task to be modified.
3) Click the 'ADD MODIFIERS' button at the bottom of the 'ADD/EDIT DETAIL ITEM' window to show the 'ADD MODIFIER' tab of this window.
4) Select the Modifier and add the quantity.



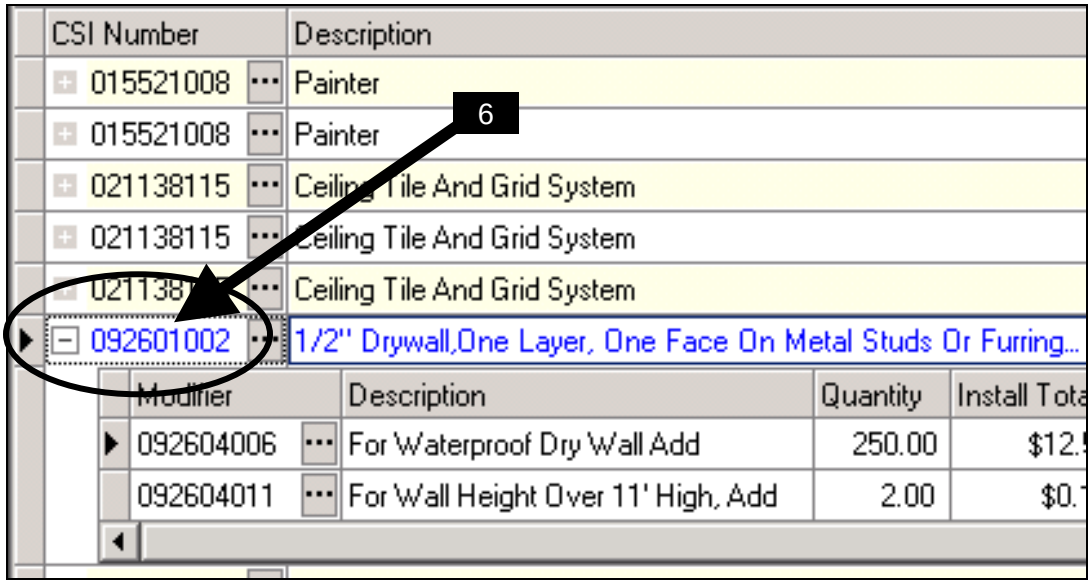


5) Click the 'ADD TO ESTIMATE/PROPOSAL' button to add the modifier to the proposal. The selected modifier disappears from the list.

6) Close the 'ADD/EDIT DETAIL ITEM' window when all applicable modifiers have been added. The task now has a modifier listed below it and offset to the right on the proposal details grid. The modifier can be hidden by clicking the 'MINUS SIGN' to the left of the CSI number. Conversely, the modifier can be expanded when hidden by clicking the 'PLUS SIGN'.

NOTE

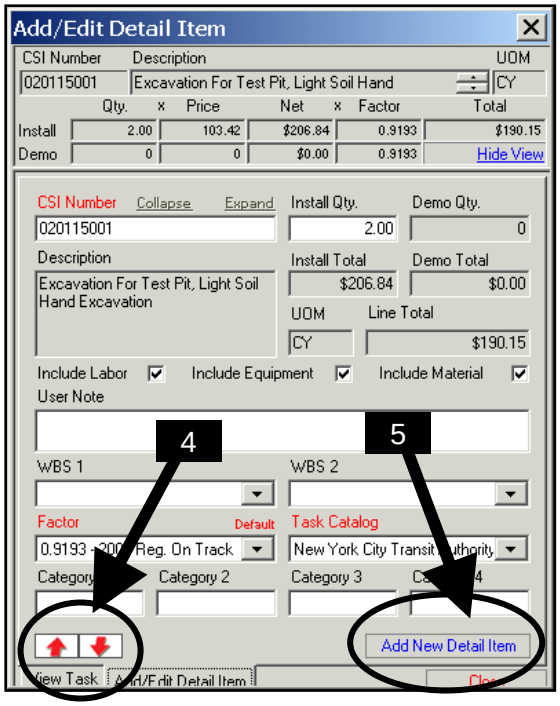
Modifiers are hidden by default when first opening the proposal details grid.



Using the 'Add/Edit Detail Item' Window

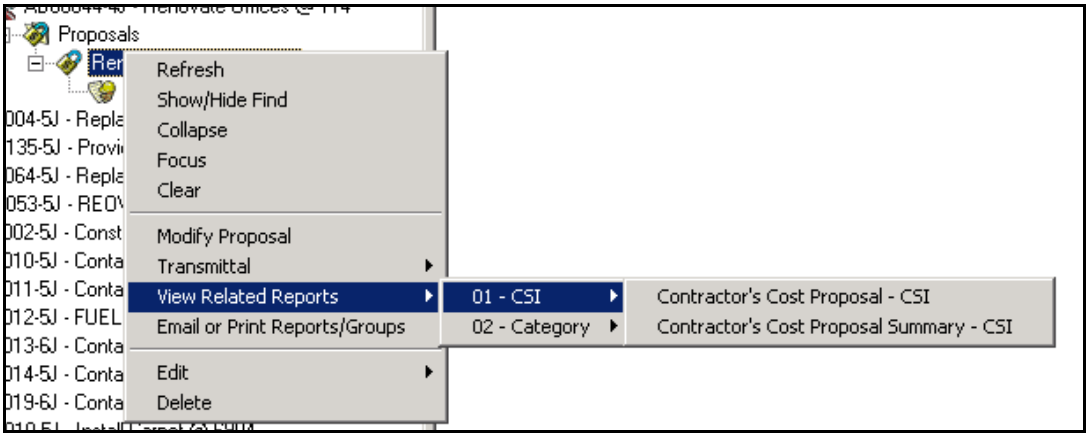
The 'ADD/EDIT DETAIL ITEM' window displays all the task information for a single task.

1) Open the 'ADD/EDIT DETAIL ITEM' window one of the following ways:
   a) Click on the points of ellipsis "…" to the right of the CSI number.
   b) Select a task and click the 'EDIT ITEM' action link.
   c) Double click on a non-editable field (Description, UOM, etc.) of the task to be modified.
2) Changes can be made here too, just like on the grid. Select the 'VIEW TASK' tab to see more details about the task including LEM cost and notes.
3) The 'RED ARROWS' on the bottom left enable scrolling through the list of tasks.
4) Click the 'ADD NEW DETAIL ITEM' button to add additional construction tasks using this window.
5) Click the 'CLOSE' button when finished.



Printing the Proposal

1. Right click on the proposal and select: "VIEW RELATED REPORTS"
   a. '01 – CSI / COST PROPOSAL CSI - DETAIL'
      i. The report develops using task detail grouped by the CSI Section.
   b. '01 – CSI / COST PROPOSAL CSI - SUMMARY'
      i. The report develops using the summary total for each CSI Section.



NOTE

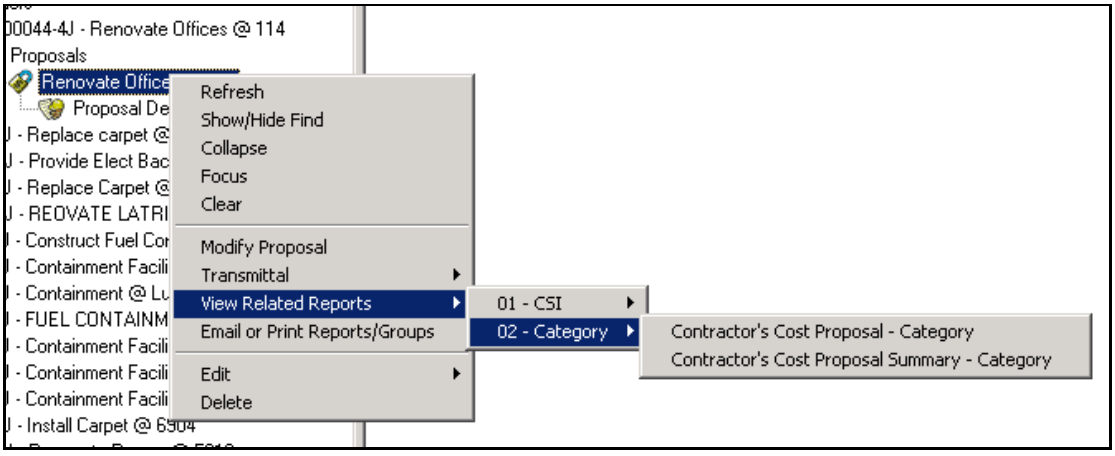
Printing in PROGEN is very customized. The report groups/names may be different than those mentioned here.

c. ’02 – CATEGORY / COST PROPOSAL CATEGORY - DETAIL’

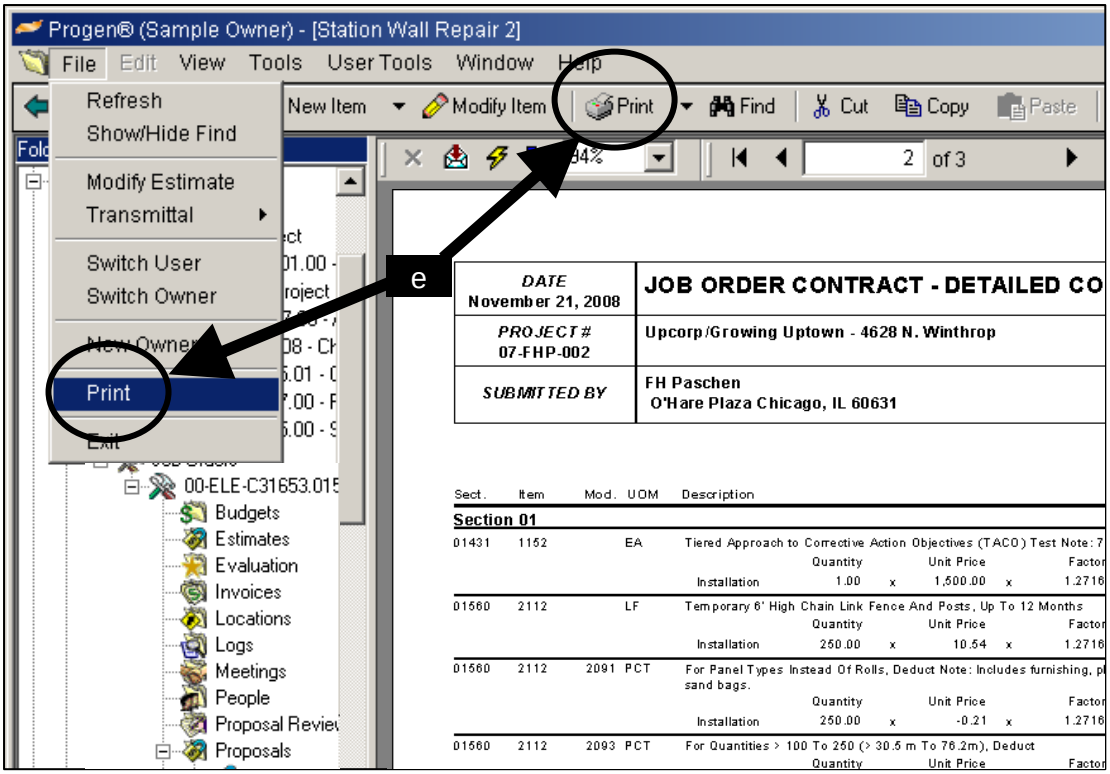
   i. The report develops using task detail grouped by the category.

d. ‘02 – CATEGORY COST PROPOSAL CATEGORY - SUMMARY’

   i. The report develops using the summary total for each category.



e. Once the report is previewed, click the printer icon or ‘FILE/PRINT’ to send the report to the default printer. Previewing the report limits the number of errors that may possibly appear on the report due to lack of or incorrect information.



Chapter 10 – Entering Subcontractor Estimates and Contracts

NOTE

See PART 1 for information on launching and logging on to PROGEN.

NOTE

Some agencies allow the prime contractor to count towards meeting M/WBE goals if the prime is an M/WBE company. If this is the case, add the prime contractor to the subcontractor list.

TIP

Click on the points of ellipsis '…' after the 'COMPANY NAME' field and the 'COMPANIES' window will open.

The Subcontractor section in the Job Order is used to track subcontracts and invoices for the prime JOC contractor. It is transmitted to the client in an effort to track subcontractor participation business statistics.

Entering Data in the 'Add Subcontractor' Window

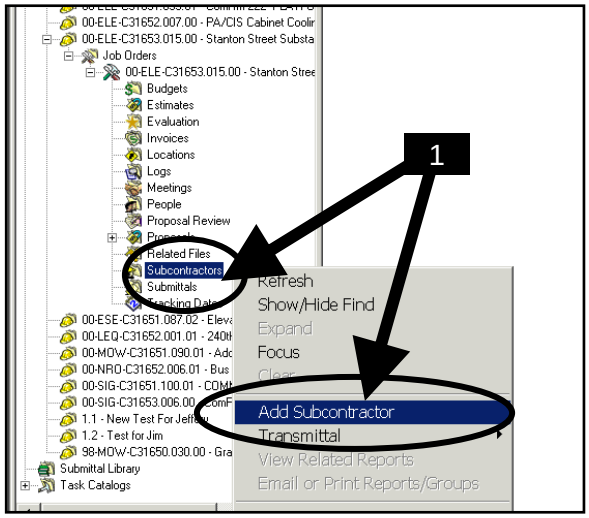
1) To add a subcontractor, either:

   a) Right click on 'SUBCONTRACTORS' to show a drop down menu, then select 'ADD SUBCONTRACTOR' to open the 'ADD SUBCONTRACTOR' window.

   b) Click the 'ADD SUBCONTRACTOR' button on the button bar

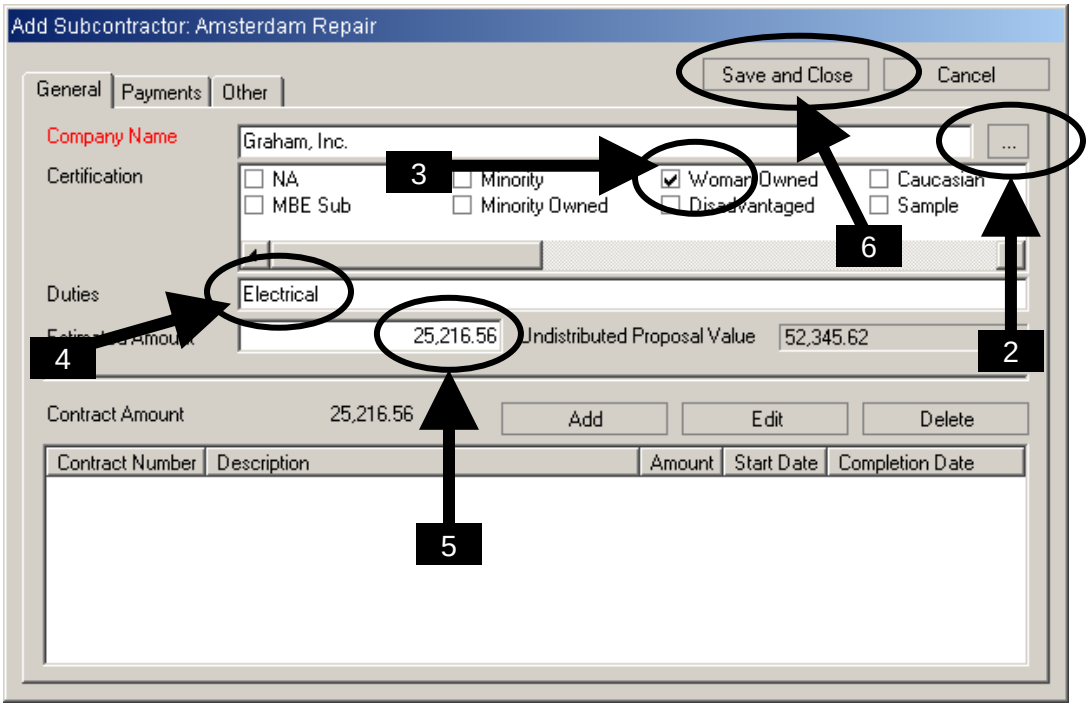
   c) Drag and Drop subcontractors from the Companies list on the top level of PROGEN.

2) In the 'ADD SUBCONTRACTOR' window, if drag and drop to add the company was not used, enter the company name by clicking the points of ellipsis '…' button and selecting from the Companies list on the top level of PROGEN.



TIPS

If you select the certification when you add a company to the top level of PROGEN, then PROGEN will automatically apply that certification to all Job Orders that you add that company to.



3) Place a check next to the certification type for the subcontractor. If no certification applies then be sure to place a check next to 'N/A'.

4) Enter the kind of work the subcontractor will perform in the duties field.

5) Enter the value that is anticipated to be the amount in the estimated amount field.

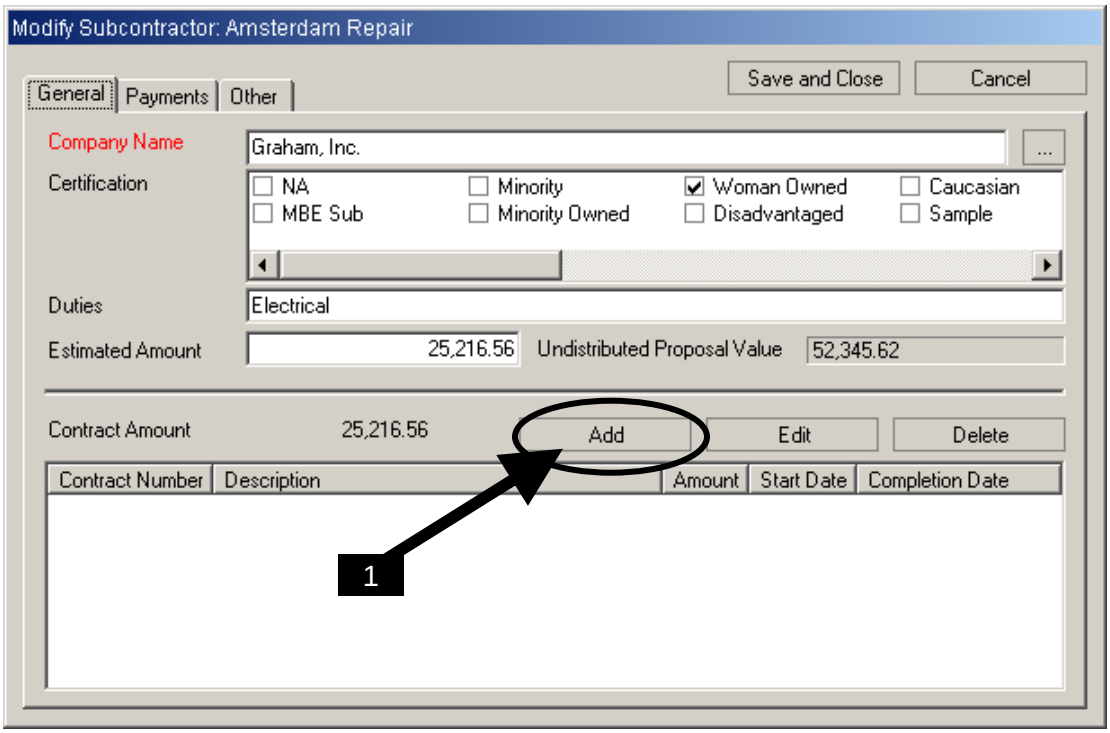
6) Click the 'SAVE AND CLOSE' button.

7) Repeat the above procedures for each subcontractor performing on the job.

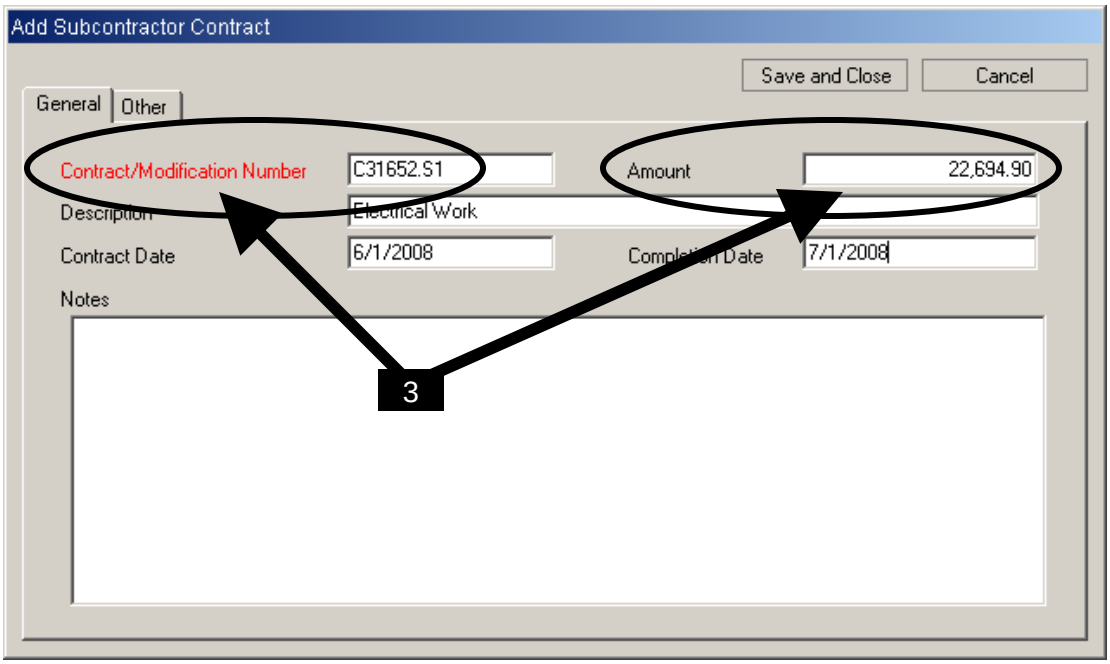
Tracking Subcontractor Contracts and Change Orders

PROGEN allows the contractor to manage the subcontractors' payments. This feature allows the contractor to keep track of the payments issued to subcontractors.

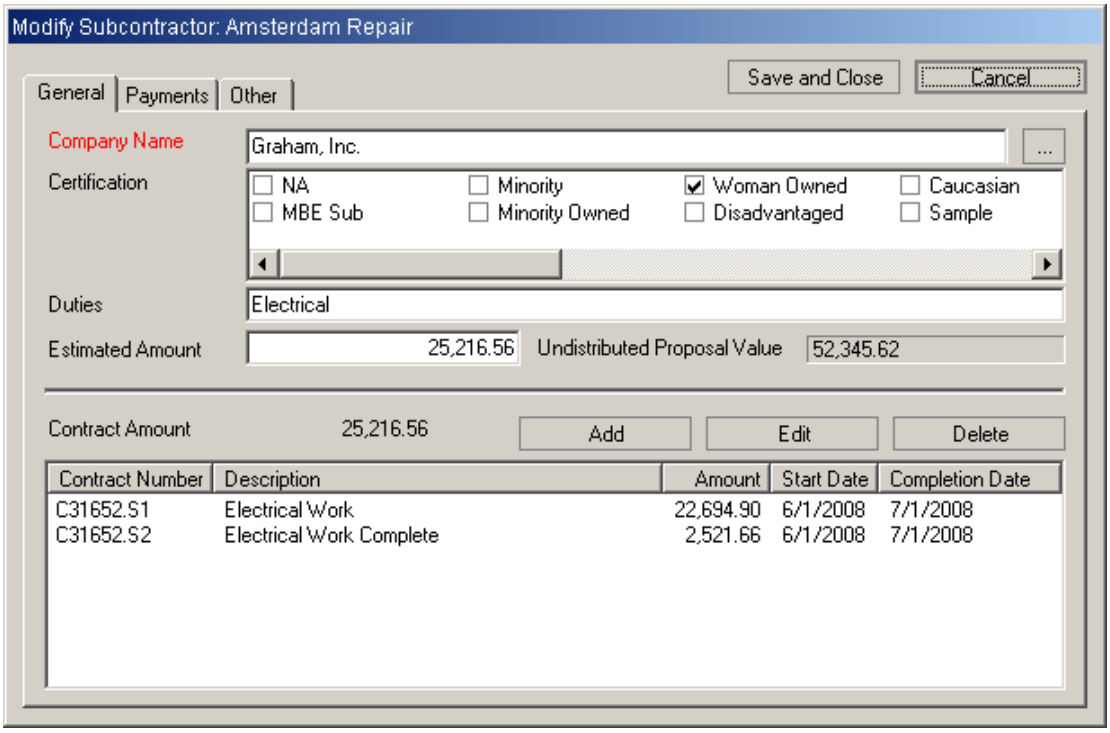
1) From the Modify Subcontractor window, click the 'ADD' button.


Modify Subcontractor: Amsterdam Repair
Save and Close
Cancel
General
Payments
Other
Company Name
Graham, Inc.
Certification
NA
MBE Sub
Minority
Minority Owned
Woman Owned
Disadvantaged
Caucasian
Sample
Duties
Electrical
Estimated Amount
25,216.56
Undistributed Proposal Value
52,345.62
Contract Amount
25,216.56
Add
Edit
Delete
Contract Number
Description
Amount
Start Date
Completion Date
1

2) The 'ADD SUBCONTRACTOR CONTRACT' window will open. Enter in the Contract/modification number, the amount, and any additional information that is pertinent.



3) As the contract and modifications are entered, the user has the ability to see at a glance the status of the current contracts for the subcontractor for that Job Order.



✓ NOTE

See Chapter 19 for information on adding subcontractor payments.

4) Click the 'SAVE AND CLOSE' button to close.

Chapter 11 – Transmitting the Data

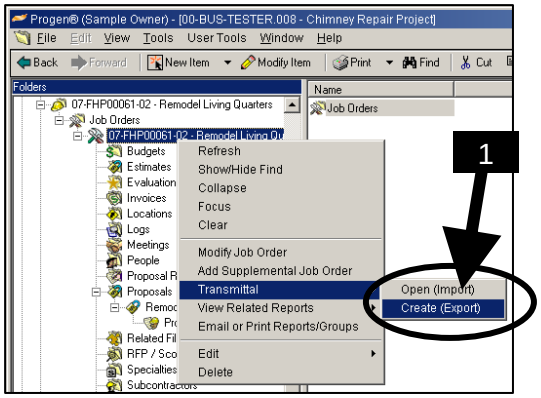
The export wizard has been designed to guide the user through the export process. An export can be initialized through the file menu **(File / Transmittal / Create (Export))** or by pressing the Transfer button in the toolbar or right click anywhere on the 'TREEVIEW' or 'LISTVIEW' sides of PROGEN and choose 'TRANSMITTAL/EXPORT'.

Choosing the Job Order (Step 1)

TIP

If the user is on a specific job order to transfer, the job will automatically be displayed in the Job Order Info box already checked.

1) Right click on the desired item to display the drop down menu and select 'TRANSMITTAL' then 'CREATE (EXPORT)' to open the 'EXPORT WIZARD'.



2) When a job order is not selected prior to bringing up the export wizard, the user may select a job using the following methods:

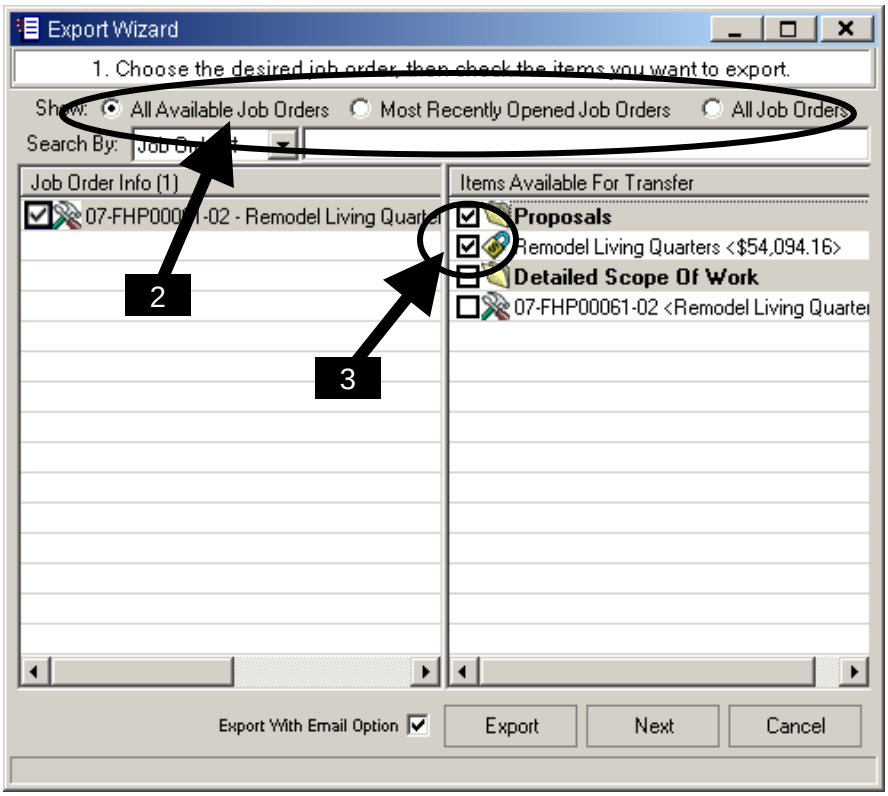
   a) All available Job Orders – Displays all the job orders for the project a user has selected.

   b) Most recently opened Job Orders - This will display the Job Orders displayed in the 'MY PROGEN' screen (up to 10).

NOTE

Each step shows instructions at the top of the wizard.

   c) All Job Orders - Displays all Job Orders created that the user has access to.



d) Search By (illustration on previous page) – To find the Job Order to export, it is possible to search for the Job Order by either the Job Order Number or the Project Number. Choose which field to search by, and then enter the number to search for.

3) Place a check to the left of the job order in order to select it. Under 'Items Available for Transfer', place a check to the left of the items to send the owner. Proposals, Subcontractor information, Invoices and/or a Detailed Scope of Work may be transmitted.

4) Click the 'NEXT' button to go to Screen 2 of the 'EXPORT WIZARD'. If 'EXPORT WITH EMAIL OPTION' is checked be sure to switch to the 'EXPORT TO USER' option prior to pressing "NEXT".

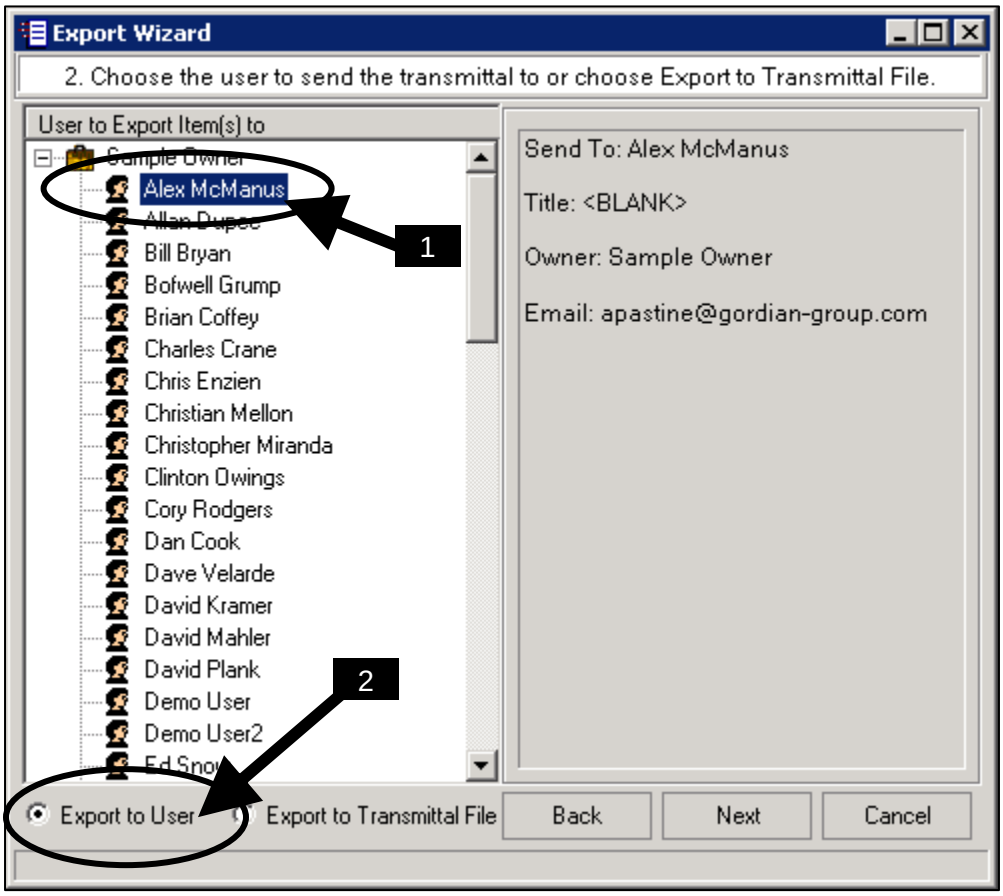
Choosing the User to Send the Transmittal To (Step 2)

1) 'USER TO EXPORT ITEM(S) TO' is on the left side.

2) Make sure the radio button selected is next to 'EXPORT TO USER'.

TECHNICAL

This list is populated from the client's user data. Users will not be able to add to or modify this list.



NOTE

A useful export option for saving the file locally is to select the 'Export to Transmittal File'.

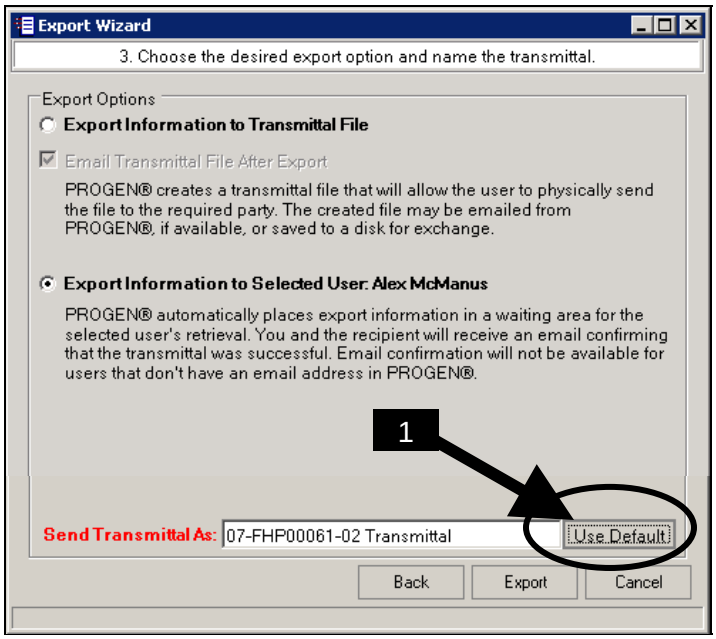
3) Select a user in the list by clicking on them once. The user will highlight in blue. The right side of the window displays information about the user selected, including the name, title, owner name and email address. Only one user may be selected to send the transmittal file to.

4) Click 'NEXT' to continue through the wizard to the final screen.

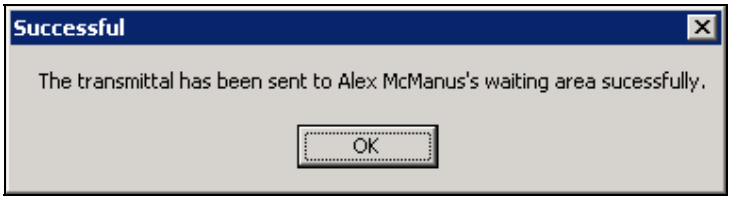
Name the Transmittal (Screen 3)

> ✓ NOTE
>
> If the instructions for moving through this wizard have been followed up to this point, there is no need to adjust the export options.

1) The default transmittal name is 'TRANSFER' followed by the date. By pressing the 'USE DEFAULT' button, the transmittal name will be the job order number followed by the word 'Transmittal' instead.


Export Wizard
3. Choose the desired export option and name the transmittal.
Export Options
Export Information to Transmittal File
Email Transmittal File After Export
PROGEN® creates a transmittal file that will allow the user to physically send the file to the required party. The created file may be emailed from PROGEN®, if available, or saved to a disk for exchange.
Export Information to Selected User: Alex McManus
PROGEN® automatically places export information in a waiting area for the selected user's retrieval. You and the recipient will receive an email confirming that the transmittal was successful. Email confirmation will not be available for users that don't have an email address in PROGEN®.
1
Send Transmittal As:
07-FHP00061-02 Transmittal
Use Default
Back
Export
Cancel

2) Click the 'EXPORT' button and a 'SUCCESSFUL' window will display stating that the item(s) was transmitted successfully.



3) Click the 'OK' button and the 'EMAIL NOTIFICATION' window will display stating that an email notification was sent to the contact to whom the transmittal was sent. The sender also gets copied on the email notification to verify that it was sent.

4) Click the 'OK' button to close the 'EMAIL NOTIFICATION' window and then press the 'CLOSE' button to exit the export wizard.

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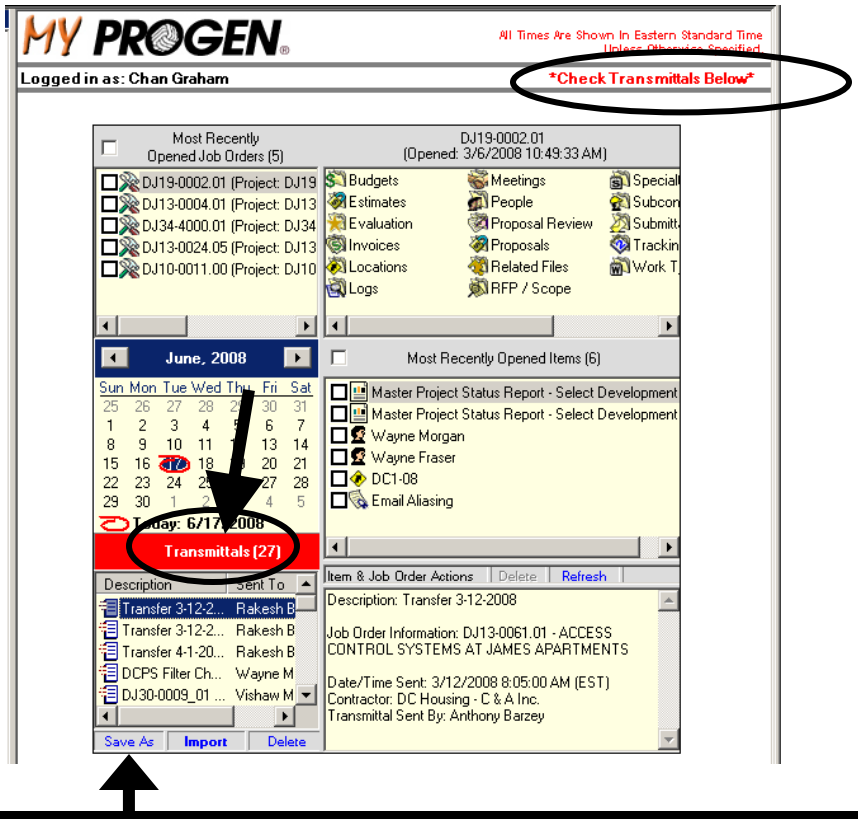
Part V – Reviewing & Approving Proposals

Chapter 12 – Validating Contractor Data

The import wizard has been designed to guide the user through the process of importing the Contractor's data. An import is initialized in the 'MY PROGEN' welcome screen.

The Transmittal Waiting Area – Red note flashes '*CHECK TRANSMITTALS BELOW*'



NOTE

If there are no transmittals waiting, 'MY PROGEN' will display two months in the calendar.

WARNING

Deleting a selected Transmittal from the Transmittals waiting area is irrecoverable. Only delete transmittals that are invalid or have been successfully imported.

Actions Links

Save As:	This link allows the user to save the selected transmittal to a file.
Import:	This link initializes the import process for the selected transmittal.
Delete:	Permanently deletes the selected transmittal.

Check Items to Import

To initialize an import, highlight the transmittal name and click the 'IMPORT' action link in the transmittal waiting area of 'MY PROGEN'.

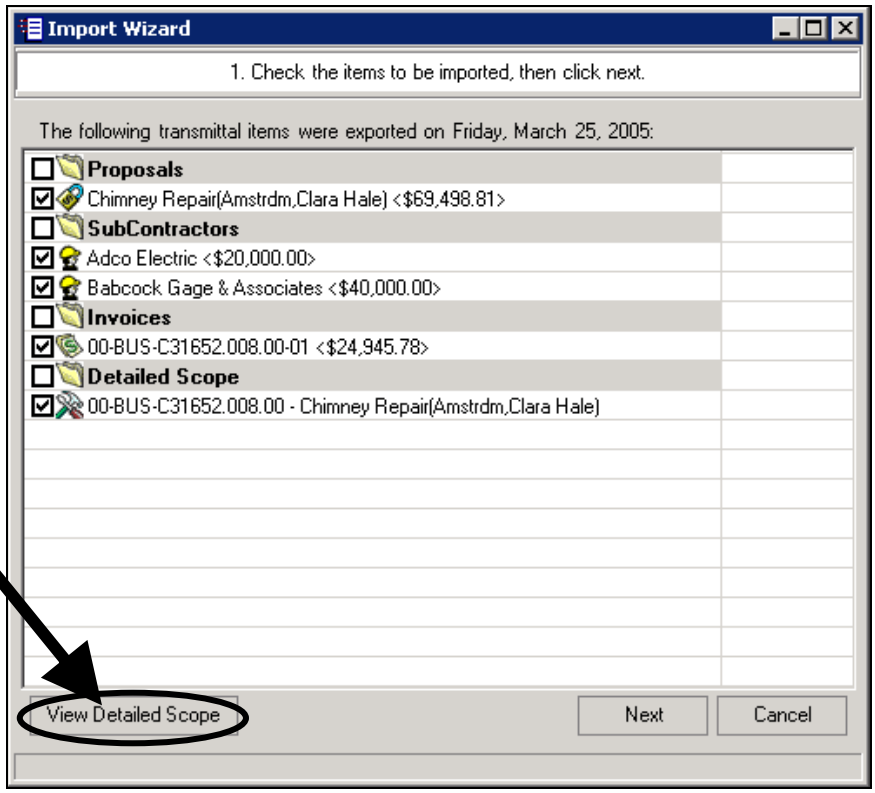
NOTE

Each step shows instructions at the top of the wizard.

1) By default all items will be checked for importing. If an item should not be imported remove the check to the left of the item and then click the 'NEXT' button. The program will only display items available in the transmittal file.

NOTE

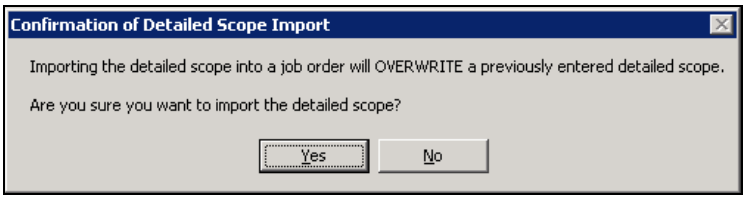
If the detailed scope is available for import, the user will be able to view it before making the decision to import it into the system.



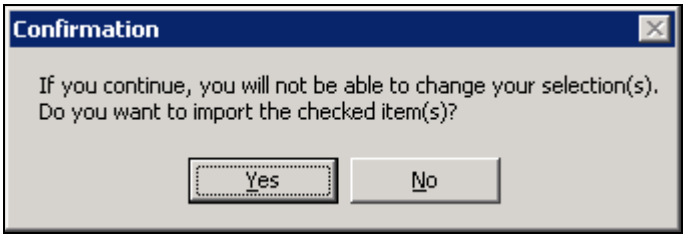
2) If the Detailed Scope of Work (DSOW) was chosen to import, pressing the 'NEXT' button will display a 'CONFIRMATION OF DETAILED SCOPE IMPORT' window. Click the 'YES' button to continue if the contractor's DSOW should overwrite the owner's DSOW.

WARNING

Importing the contractor's detailed scope of work will overwrite the existing scope.


Confirmation of Detailed Scope Import
Importing the detailed scope into a job order will OVERWRITE a previously entered detailed scope.
Are you sure you want to import the detailed scope?
Yes
No

3) Another confirmation window will display, click 'YES' to continue.


Confirmation
If you continue, you will not be able to change your selection(s).
Do you want to import the checked item(s)?
Yes
No

Match or Add Items

1) If a contractor has submitted a new company or list item, the 'Match or add the specified list item or company' window will display.

   a) The new item that the contractor submitted is located in blue.

   b) PROGEN will attempt to find an identical match.

   c) If no match is found the user should scroll through the list and verify that there are no similar items listed (BC Services vs. BC Services Inc., e.g.). If there are no similar items listed, check the box 'NO MATCH FOUND' at the bottom of the window.

   d) The 'MATCH' button will change to 'ADD'. Click the 'ADD' button.

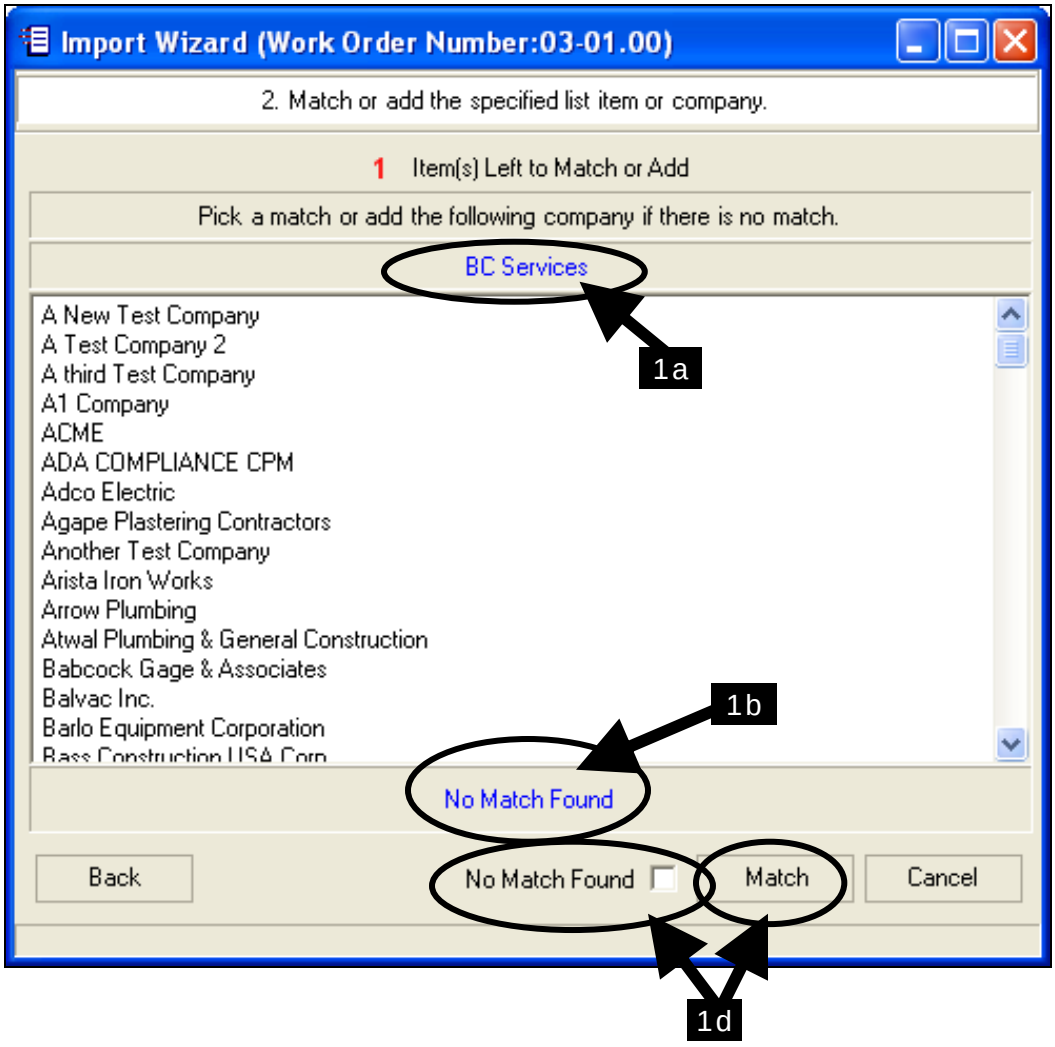
   e) If a match is found, make sure it is selected and highlighted blue then click the 'MATCH' button.

NOTE

The match list items page will only display if the contractor has submitted data that has not been previously matched.

TECHNICAL

When an item is matched or added, that item will not need to be matched to that contractor again.



Choosing a Job Order

1) The program will automatically check the Job Order if the contractor used the identical job order number as the owner. However, there are times when a contractor may have entered a different job number and a user may select a job using the following methods:

   a) All available Job Orders - Displays all the job orders for the project a user has selected.

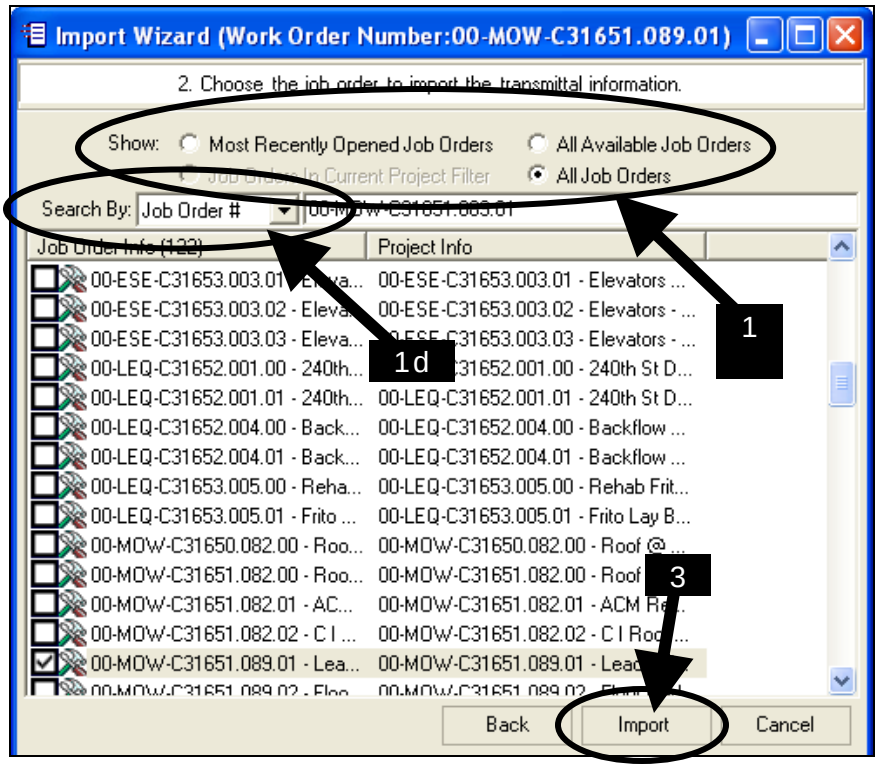
   b) Most recently opened Job Orders - This will display the Job Orders displayed in the 'MY PROGEN' screen (up to 10).

   c) All Job Orders - Displays all Job Orders created that the user has access to.

   d) Job Order's in current project filter – Displays only the Job Orders that the user has defined in their project folder.

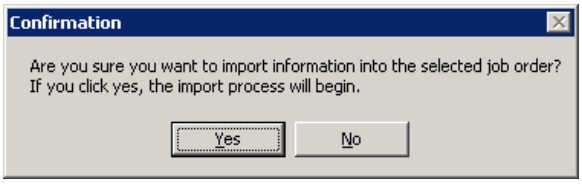
> **NOTE**
>
> Security is checked for each option. If users are not permitted to view a job, they will not be able to import a proposal into it.

2) Search By – To find the Job Order to import into, it is possible to search for the Job Order by either the Job Order Number or the Project Number. Choose which field to search by, and then enter the number to search for.



3) Place a check mark to the left of the job order to import the data into. Click the 'IMPORT' button.

4) A 'CONFIRMATION' screen will display to verify that the job order selected is correct. Click the 'YES' button.

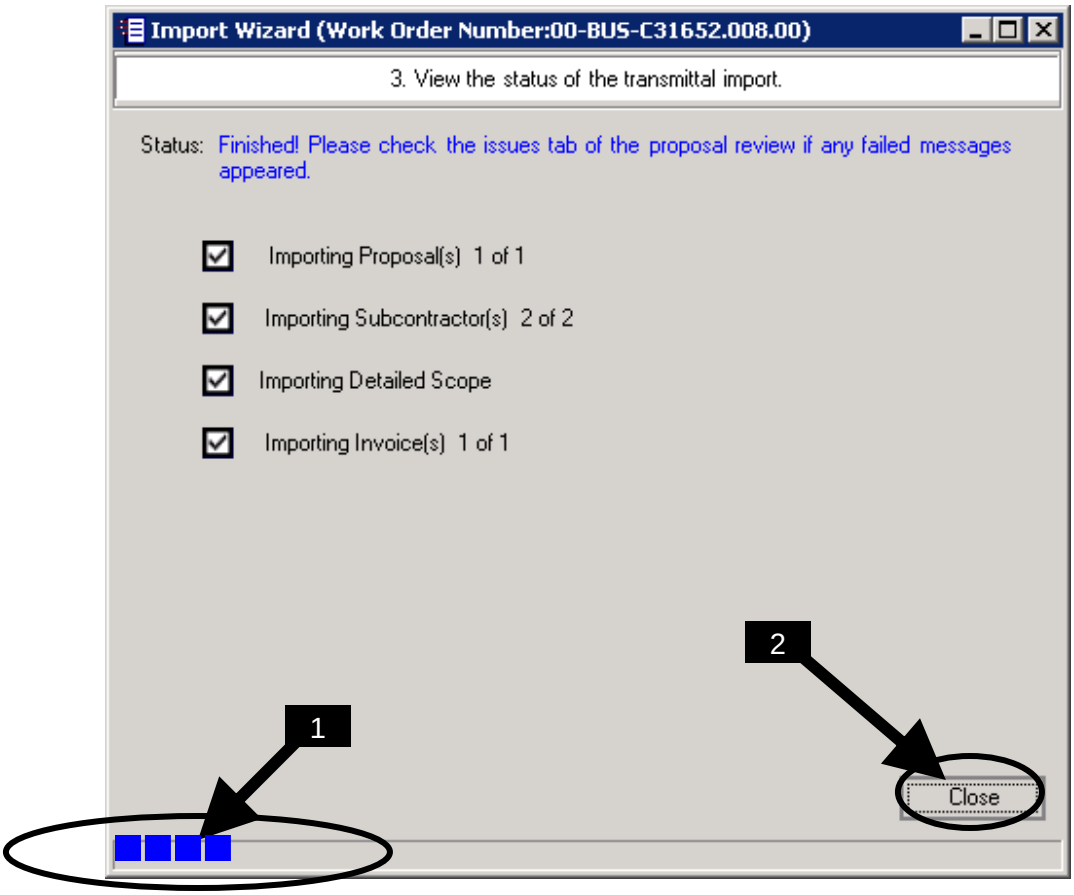

Confirmation
Are you sure you want to import information into the selected job order?
If you click yes, the import process will begin.
Yes
No

Status of Transmittal

> **NOTE**
>
> The progress bar at the bottom of the wizard will show the progress of the import.

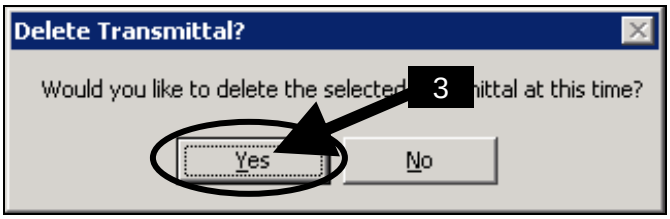
1) The program will begin the process of validating the data. The progress bar will let the user know the status of the import.

2) When the import is complete, the Status will display 'Finished!' or 'Failed!' If the validation failed, go to the Proposal Review folder under the selected job order to read the failed messages. Click the 'CLOSE' button.


Import Wizard (Work Order Number:00-BUS-C31652.008.00)
3. View the status of the transmittal import.
Status: Finished! Please check the issues tab of the proposal review if any failed messages appeared.
Importing Proposal(s) 1 of 1
Importing Subcontractor(s) 2 of 2
Importing Detailed Scope
Importing Invoice(s) 1 of 1
1
2
Close

> **TIPS**
>
> If the proposal passed validation, it is no longer necessary to keep the transmittal in the 'MY PROGEN' waiting area and can be deleted.

3) To delete the transmittal from the Transmittal Waiting area, click the 'YES' button. The transmittal should not be deleted if validation failed.



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Chapter 13 – Reviewing and Approving Proposals

TIP

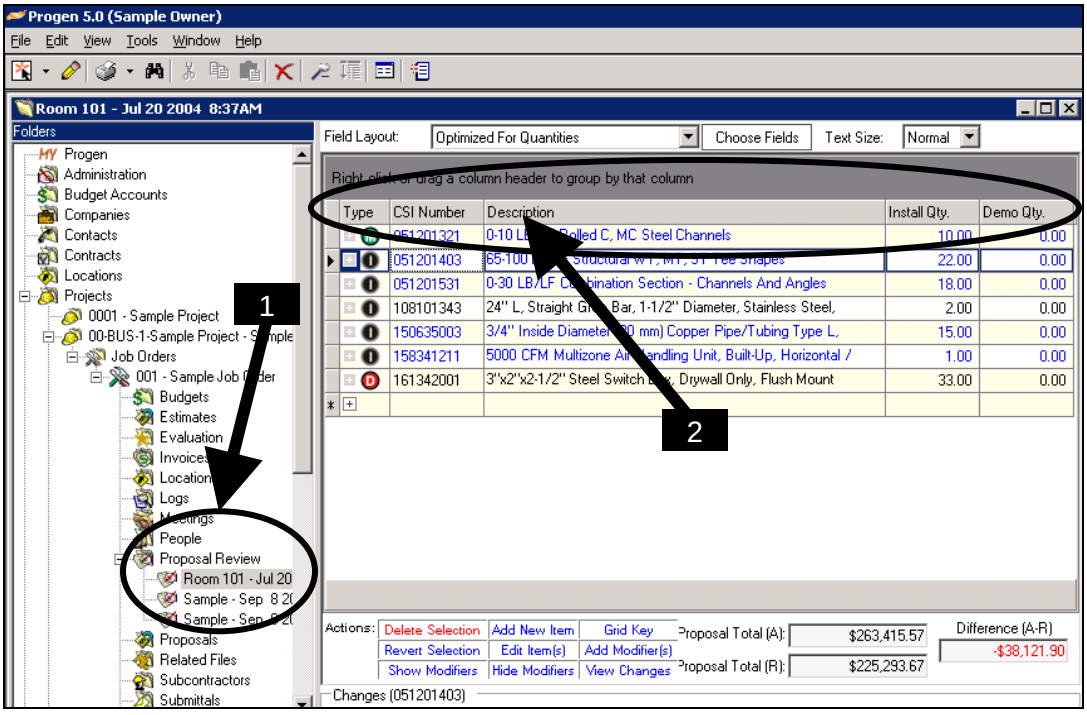
See PART 1 for information on launching and logging on to PROGEN

Some features of the Proposal Review window are the ability to: Optimize Field Layouts, Grouping Capabilities, and make Modifications, Deletions and Additions to tasks.

Changing the Review Screen

1) Click on the imported proposal on the 'TREEVIEW' side to open the proposal review grid.

2) 'FIELD LAYOUT' – by default, the first time the proposal review grid is accessed, five columns are displayed. The columns are; TYPE, CSI NUMBER, DESCRIPTION, INSTALL QTY., and DEMO QTY.



TIP

See Chapter 12 for information on importing data from contractors.

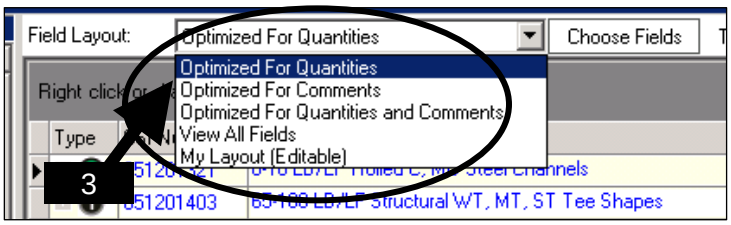
3) The different options in the 'FIELD LAYOUT' Drop Down are;

a) **Optimized for Quantities** – The grid displays the columns TYPE, CSI NUMBER, DESCRIPTION, INSTALL QTY., and DEMO QTY.

NOTE

The only option in the field layout that will save the layout chosen (including columns and column widths) is the My Layout option.

b) **Optimized for Comments** – The grid displays the columns TYPE, CSI NUMBER, DESCRIPTION, USER NOTE and REVIEW NOTE.



c) **Optimized for Quantities and Comments** – The grid displays the columns TYPE, CSI NUMBER, DESCRIPTION, INSTALL QTY., DEMO QTY., USER NOTE and REVIEW NOTE.

d) **View All Fields** – The grid will display all columns.

e) **My Layout (Editable)** – PROGEN will remember which fields are chosen to view.

4) Customizing 'MY LAYOUT (EDITABLE)'

a) Click the 'CHOOSE FIELDS' button to open the 'CHOOSE FIELDS' selection window.

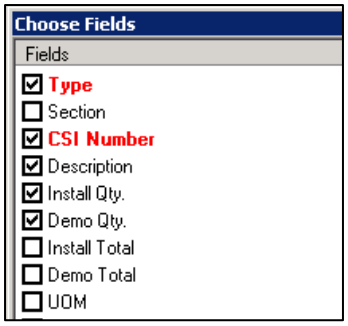
b) Select the box next to the field to be displayed in the Proposal Review grid. NOTE that the red text indicates that these fields cannot be hidden.

c) PROGEN will remember which fields chosen to view when 'MY LAYOUT' is selected in the 'FIELD LAYOUT' menu.

d) The TEXT SIZE menu enables customization of the size of the text desired in the Proposal Review grid only.

i) **Normal** – The text size matches all text within the system.

ii) **Larger** – The text size is larger than all text within the system.

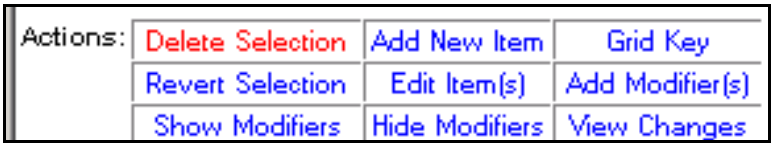


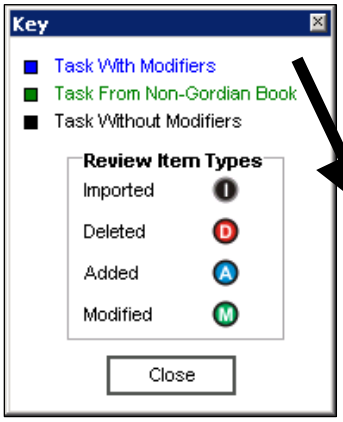
TIP

Suggested columns to show in the Proposal Review grid are:

- TYPE
- CSI NUMBER
- DESCRIPTION
- INSTALL QTY.
- DEMO QTY.
- CATEGORY 1
- USER NOTE
- REVIEW NOTE

Action Links





DELETE SELECTION – Marks selected imported items and their modifiers as deleted. (If selected, will always prompt for deletion confirmation.)
ADD NEW ITEM – Opens search capability to add a new item. (See additional info later in this chapter.)
GRID KEY – Defines all symbols and colors on the grid.
REVERT SELECTION – Changes the quantities for the selected tasks back to their original quantities. Changes deleted or modified tasks back to their original values when imported. (If selected, will always prompt for revert confirmation.)
EDIT ITEM(S) – Opens the task detail window for the selected task. If multiple tasks are selected, the make multiple changes window will open. (See additional info later in this chapter.)
ADD MODIFIER(S) – Add a modifier directly to a task. (See additional info later in this chapter.)
SHOW MODIFIERS – Expands all modifiers.
HIDE MODIFIERS – Hides all modifiers.
VIEW CHANGES – Opens a window that opens a summary of all changes made. (See additional info later in this chapter.)

Making Changes to the Proposal Review

Note: Changing tasks on the proposal review grid does **not** actually change the contractor's proposal. Also, if tasks are changed on the proposal review grid and the proposal is approved, then the changes will be ignored and the proposal will be approved exactly as the contractor submitted it.

TIP

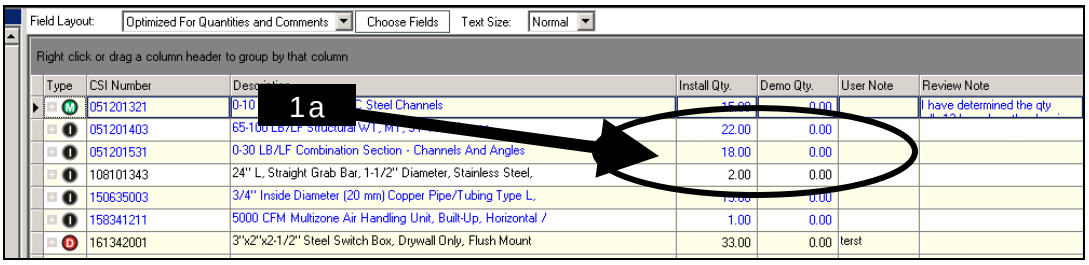
If the quantities are changed or items are added or deleted, the user should explain why in the review note field.

1) **Editing Existing Tasks**

a) Modifying items directly on the grid. There are four fields that can be changed directly on the Proposal grid: CSI NUMBER, INSTALL QTY, DEMO QTY, and REVIEW NOTE.

i) Place the cursor in the field that needs to be changed. It should highlight the existing data.

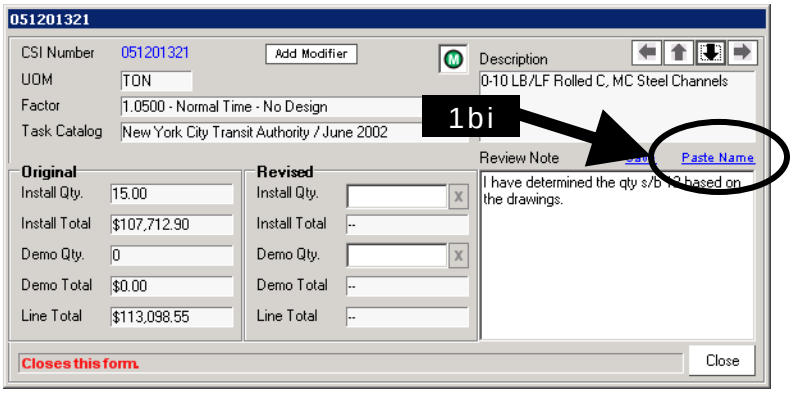
ii) Type in the new value. The icon under type will change to (green 'M').



b) Modifying a single item using the 'VIEW TASKS DETAILS' window.

i) Double click the task or select the task and Click the 'EDIT ITEM(S)' action link. The 'VIEW TASKS DETAILS' window opens. In this window, just as on the grid, a user may only edit INSTALL QTY., DEMO QTY., and REVIEW NOTE.

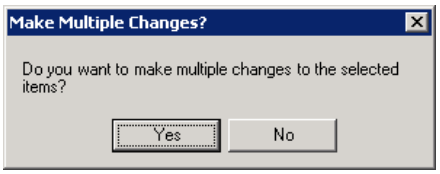
ii) If multiple users are reviewing a proposal, it is a good idea to input who made the changes. This is accomplished by clicking the 'PASTE NAME' action link above the review note.



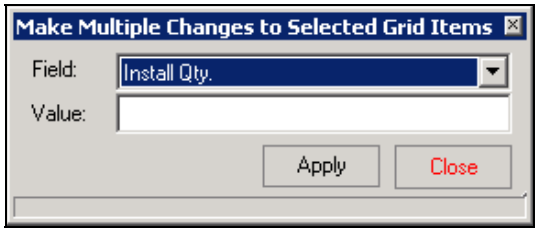
c) Modifying multiple items.

i) Select multiple tasks and click the 'EDIT ITEM(S)' action link.

ii) A confirmation window opens verifying that the user wants to make changes to all selected tasks. Click the 'YES' button to continue.



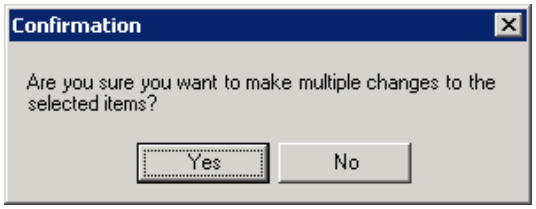
iii) The 'MAKE MULTIPLE CHANGES TO SELECTED GRID ITEMS' opens. Only the INSTALL QTY., DEMO QTY., and REVIEW NOTE fields can be changed for all items selected.



iv) Select the field to modify and input the new value for all selected tasks.

v) Click 'APPLY' and a confirmation window opens.

vi) Click 'YES' to apply the changes to all of the selected items.



TIP

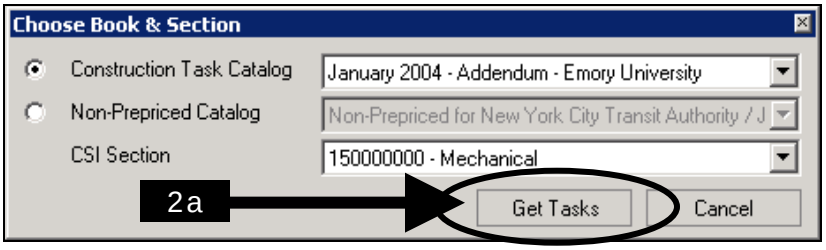
If the contractor applied an incorrect or blank category to a line item, suggest changing the category in the review note field.

2) **Adding Items**

a) Adding Tasks

i) Click the 'ADD NEW ITEM' action link. The 'CHOOSE BOOK & SECTION' window opens. Select the catalog and CSI section to search.

ii) Click the 'GET TASKS' button to open a search window for the selected section.

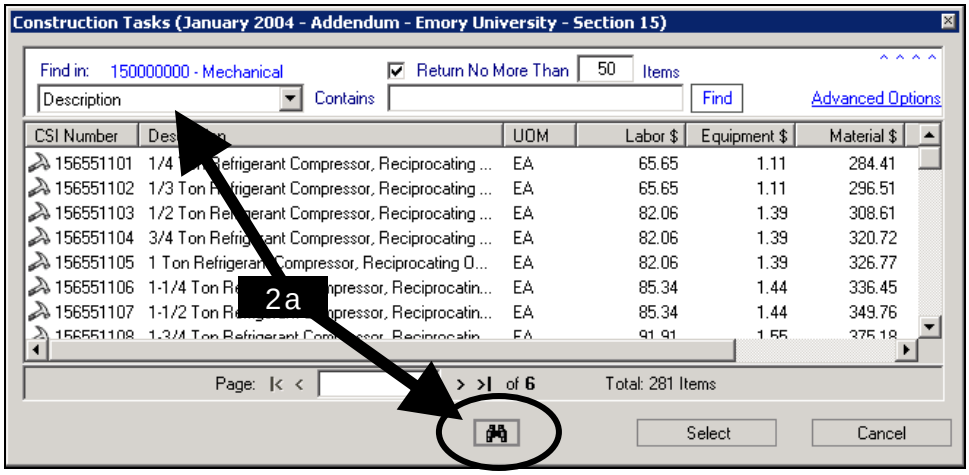


iii) The 'CONSTRUCTION TASKS' window for the selected catalog and CSI section will open. Click the binoculars to open the search panel.

iv) Enter the items to be searched for in the 'CONTAINS' field, then Click the 'FIND' button.

v) If the task is found in the list, click on it once to select and Click the 'SELECT' button to add the item.

vi) The item is added to the Proposal Review grid with a (A) (blue A).

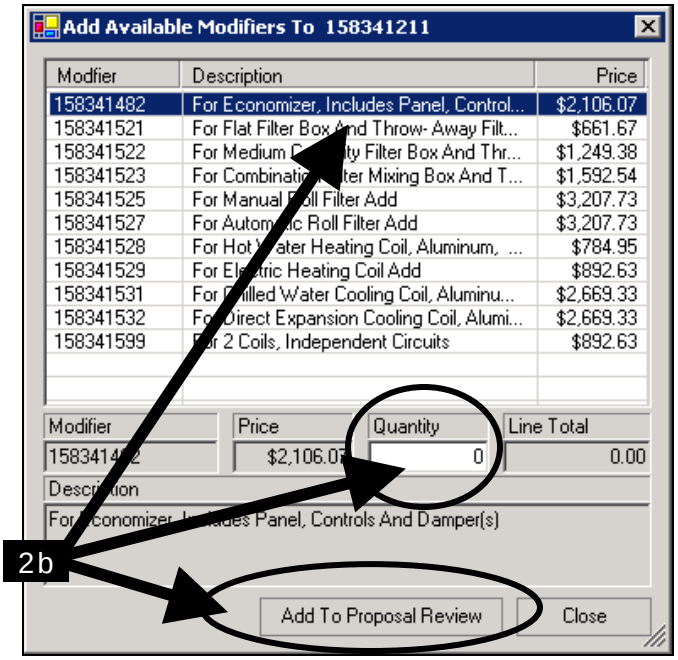


b) Adding Modifiers

i) If a task on the grid is blue then modifiers may be added. Click the 'ADD MODIFIER(S)' action link. The 'ADD AVAILABLE MODIFIERS TO (TASK NUMBER)' window opens.

ii) Select the modifier by clicking on it once.

iii) Enter a quantity in the Quantity field and Click 'ADD TO PROPOSAL REVIEW'.


Add Available Modifiers To 158341211
Modifier
Description
Price
158341482 For Economizer, Includes Panel, Control... $2,106.07
158341521 For Flat Filter Box And Throw- Away Filt... $661.67
158341522 For Medium Efficiency Filter Box And Thr... $1,249.38
158341523 For Combination Filter Mixing Box And T... $1,592.54
158341525 For Manual Roll Filter Add $3,207.73
158341527 For Automatic Roll Filter Add $3,207.73
158341528 For Hot Water Heating Coil, Aluminum, ... $784.95
158341529 For Electric Heating Coil Add $892.63
158341531 For Chilled Water Cooling Coil, Aluminu... $2,669.33
158341532 For Direct Expansion Cooling Coil, Alumi... $2,669.33
158341599 For 2 Coils, Independent Circuits $892.63
Modifier
Price
Quantity
Line Total
0.00
Description
For Economizer, Includes Panel, Controls And Damper(s)
2b
Add To Proposal Review
Close

TIP

Another way to delete selected tasks is by typing the delete button on the keyboard.

TIP

If a task needs to be removed from a proposal, do not change the quantity to zero. Delete the item from the proposal review.

3) **Deleting Tasks**

a) Click on the specific item or multi-select numerous tasks.

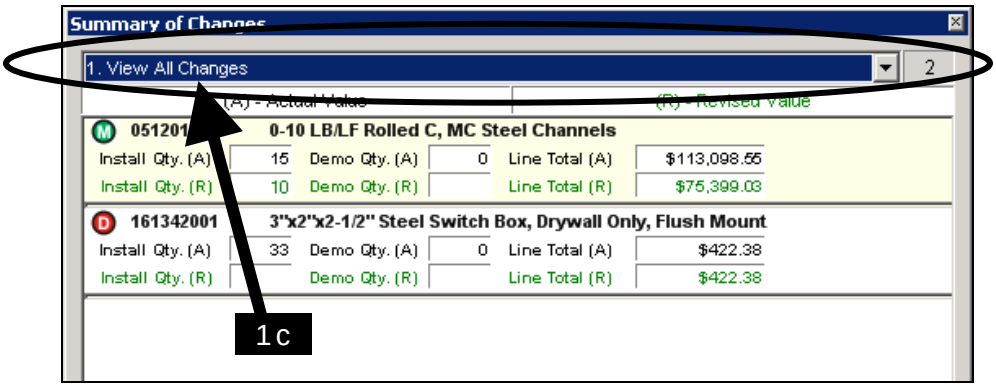
b) Click the 'DELETE SELECTION' action link or type delete on the keyboard.

c) The item is marked in the Proposal Review grid with a (D) (red D).

Quick Viewing of Owner Changes

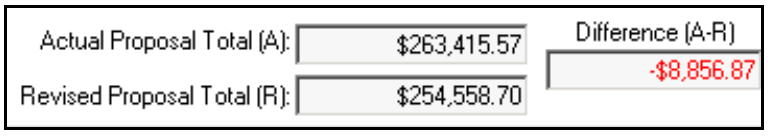
A user has the ability to see only those changes that were made.

1. On-Screen Viewing
    a) Select the 'VIEW CHANGES' action link.
    b) The 'SUMMARY OF CHANGES' window opens.
    c) To select what changes to view click the down arrow at the top of the window.
        i) #1 - View All Changes
        ii) #2 - View Quantity Changes
        iii) #3 - View Review Note Additions
        iv) #4 - View Added Items
        v) #5 - View Deleted Items


Summary of Changes
1. View All Changes
2
(A) - Actual Value
(R) - Revised Value
M 051201 0-10 LB/LF Rolled C, MC Steel Channels
Install Qty. (A) 15 Demo Qty. (A) 0 Line Total (A) $113,098.55
Install Qty. (R) 10 Demo Qty. (R) Line Total (R) $75,399.03
D 161342001 3"x2"x2-1/2" Steel Switch Box, Drywall Only, Flush Mount
Install Qty. (A) 33 Demo Qty. (A) 0 Line Total (A) $422.38
Install Qty. (R) Demo Qty. (R) Line Total (R) $422.38
1c

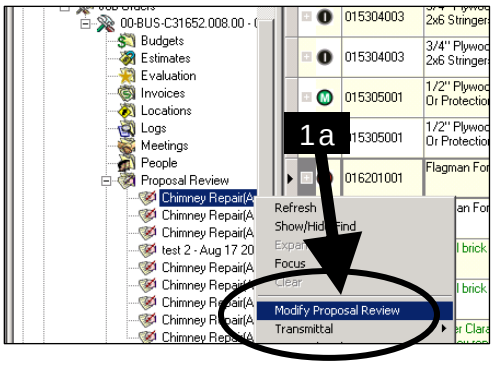
Reviewing Pricing Changes

1. There is a proposal total review section at the bottom right of the window that displays the monetary difference from changes made by the owner.
    a. Actual Proposal Total (A) – Total of the Proposal that the contractor submitted.
    b. Revised Proposal Total (R) – Total of the Proposal based on owner revisions.
    c. Difference (A-R) – Difference between the value of the proposal submitted by the contractor and the value of the owner revisions.



Approving a Proposal

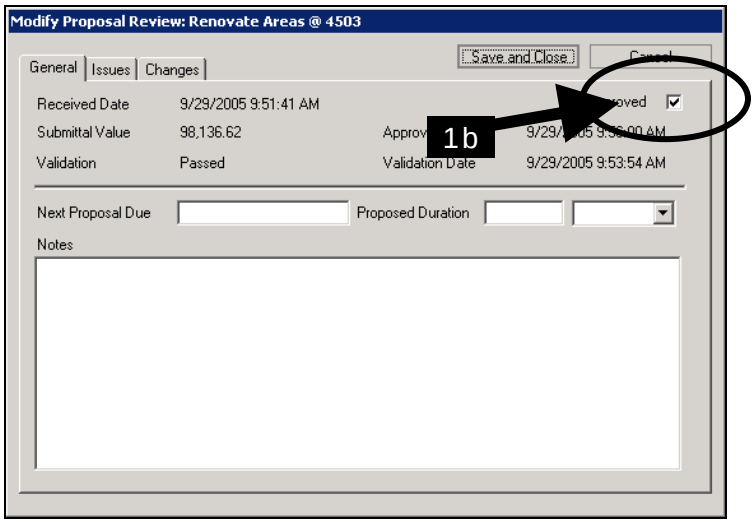
After the proposal has been reviewed, a user may approve it. Or, if it is not to the satisfaction of the owner, send the contractor the review comments.



1. APPROVE

   a. Right click on the Proposal Review and select Modify Proposal Review from the menu.

   b. Place a check next to the Approved box.

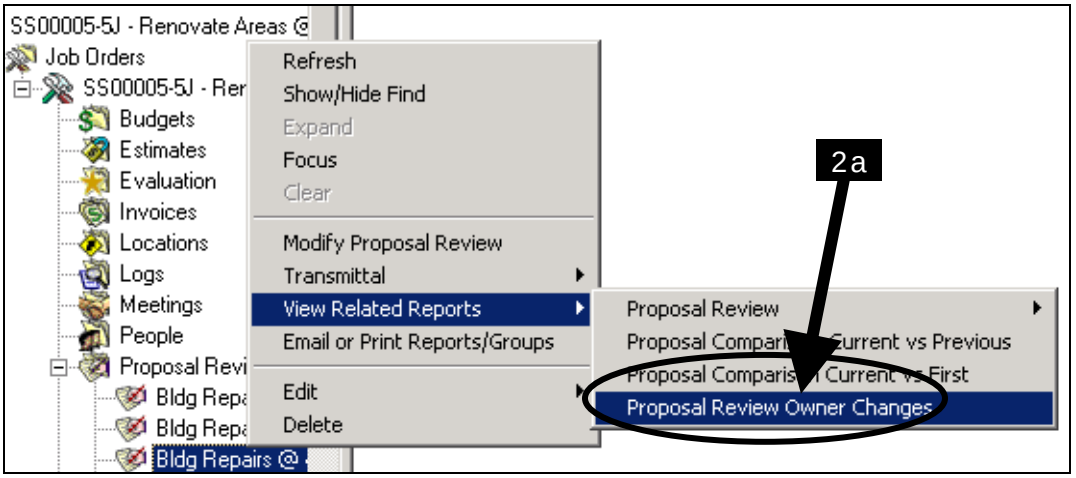


   c. A 'DETAIL INFORMATION' window will alert the user that 'Any changes made to this proposal review's details will not be added to the proposal area.' By clicking 'OK,' the user acknowledges this proposal as the final.

   d. Click 'SAVE AND CLOSE'.

2. SEND OWNER COMMENTS

   a. Right Click on the Proposal Review and select View Related Reports / Proposal Review Owner Changes.



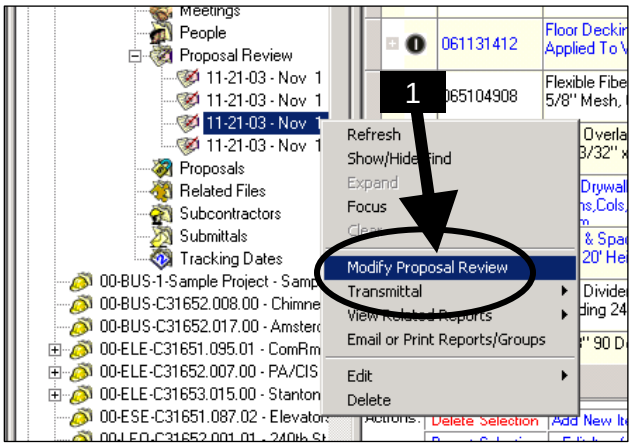
   b. A Report will open on the 'LISTIVEW' panel. See Part VI for emailing/printing reports.

Viewing Contractor Proposal Changes

TIP

Use the Owner changes report discussed in the previous section of this chapter as a checklist to verify that all of the changes were made.

The ability to quickly view the differences between a current proposal and a contractor's previous proposal is an important step in a review. PROGEN makes this task very simple.



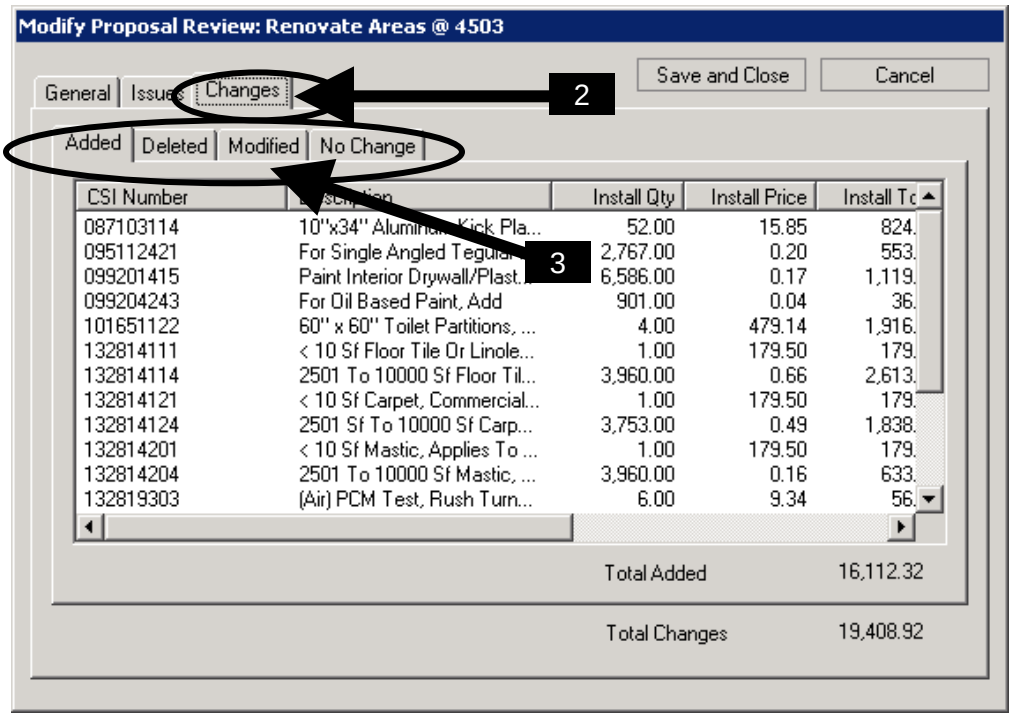
1. After importing the proposal, right click on the new proposal review and choose Modify Proposal Review from the menu.
2. Select the Changes tab from the 'MODIFY PROPOSAL REVIEW' window.
3. There are four sub-tabs within the Changes tab

   a. Added – Shows all items added to the proposal from the previous proposal.

   b. Deleted – Shows all items deleted from the proposal.

   c. Modified – Shows all items modified in any way from the previous proposal.

   d. No Change – Shows all items that were not changed from the previous proposal.


Modify Proposal Review: Renovate Areas @ 4503
General
Issues
Changes
2
Save and Close
Cancel
Added
Deleted
Modified
No Change
3
CSI Number
Install Qty
Install Price
087103114 52.00 15.85
095112421 2,767.00 0.20
099201415 6,586.00 0.17
099204243 For Oil Based Paint, Add 901.00 0.04
101651122 60" x 60" Toilet Partitions, ... 4.00 479.14
132814111 < 10 Sf Floor Tile Or Linole... 1.00 179.50
132814114 2501 To 10000 Sf Floor Til... 3,960.00 0.66
132814121 < 10 Sf Carpet, Commercial... 1.00 179.50
132814124 2501 Sf To 10000 Sf Carp... 3,753.00 0.49
132814201 < 10 Sf Mastic, Applies To ... 1.00 179.50
132814204 2501 To 10000 Sf Mastic, ... 3,960.00 0.16
132819303 (Air) PCM Test, Rush Turn... 6.00 9.34
Total Added 16,112.32
Total Changes 19,408.92

Printing Reports

1. Right Click on the Proposal and select: 'VIEW RELATED REPORTS'
   a. Proposal Review
      i. Displays the contractor's proposal task detail information by CSI or category. Looks exactly like the contractor's proposal report, but prints from the proposal review level.
   b. Proposal Comparison Current vs. Previous
      i. The report compares the validated proposal review that is selected to the previous passed validated proposal review. This is helpful in comparing the new proposal to the previous to make sure that the contractor has made all changes to the proposal as requested.
   c. Proposal Comparison Current vs. First
      i. The report compares the validated proposal review that is selected to the first passed validated proposal review. This is helpful in comparing the original proposal to the most recent in order to note the overall changes in the proposal from the first proposal submitted to the final proposal submitted.
   d. Owner Changes
      i. Displays the changes and comments that the owner requests from the contractor.

✓ NOTE

A report can be emailed directly to the contractor. See Chapter 22.

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Chapter 14 – Issuing a Notice to Proceed

✓ NOTE

Some agencies call the Notice to Proceed a Job Order, Sub Order or Purchase Order. All terms can be used interchangeably

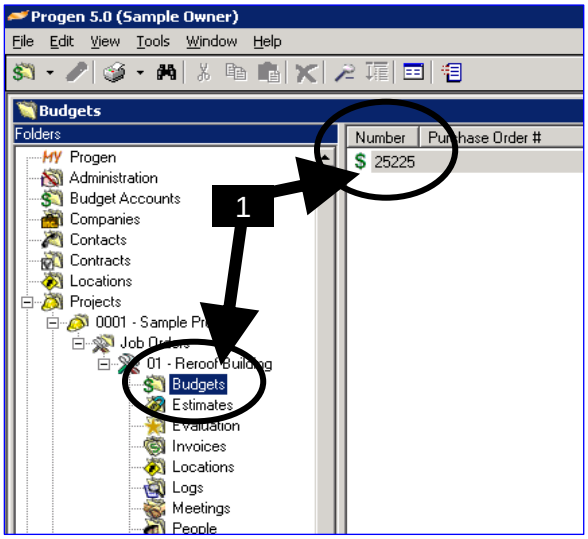
After approving the proposal, the next step in procuring the JOC project is the issuance of the Notice to Proceed (NTP). Before an NTP can be issued, the user must verify that all required information has been entered into the PROGEN system. Every facility owner has their own requirements for a NTP, but the steps outlined below show typical information needed to issue an NTP. Not all of them may be necessary to issue an NTP.

✓ NOTE

Depending upon the agency's setup, only certain fields may need to be entered and/or some fields' labels may be different. To find out exactly what fields are required to have input in budgets, contact the on-site TGG representative.

Verify a Budget has been Attached

1. Select the 'BUDGETS' icon. If a budget has been attached, it will display in the 'TREEVIEW'.
2. If a budget has been attached to the Job Order, proceed to the Independent Cost Estimate.
3. If no budget exists, a budget may need to be attached to the Job Order.
4. To attach a budget to a Job Order, drag and drop an existing budget account from the 'Budget Accounts' at the top level of PROGEN.
5. If the budget account that is needed for this Job Order does not exist, go to Part II, Chapter 4, "Adding a Budget" for instructions on adding a budget account.

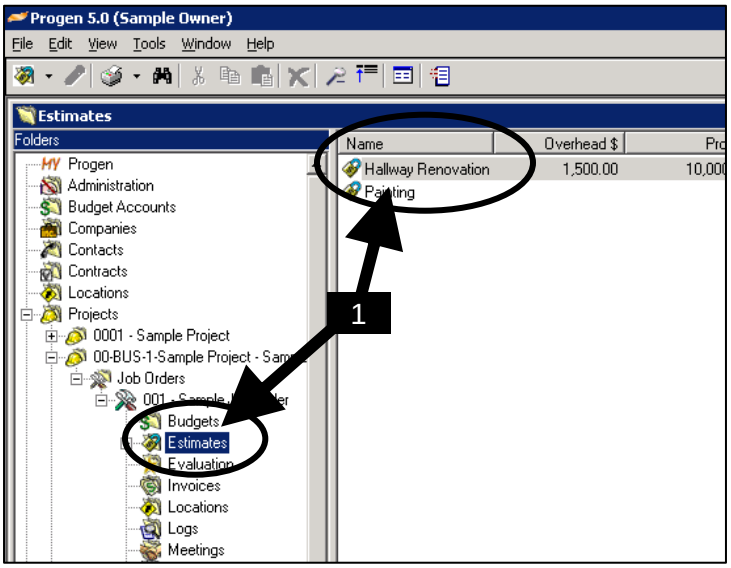


✓ NOTE

PROGEN has the capability to store multiple estimates. For instance, an independent estimate developed by an A/E firm could also be added to estimates as a lump sum estimate. Having multiple estimates input is not an issue when issuing a NTP.

Verify the Independent Cost Estimate has been Created

1. Select the 'ESTIMATES' icon. If an estimate has been completed, it will display in the 'TREEVIEW'.
2. If an estimate has been completed, proceed to verify that a location has been attached.
3. If no Independent Cost Estimate exists, an Independent Cost Estimate must be completed. For instructions on adding an Independent Cost Estimate, go to Part III, Chapter 8, "Creating an In**dependent Cost Estimate."**

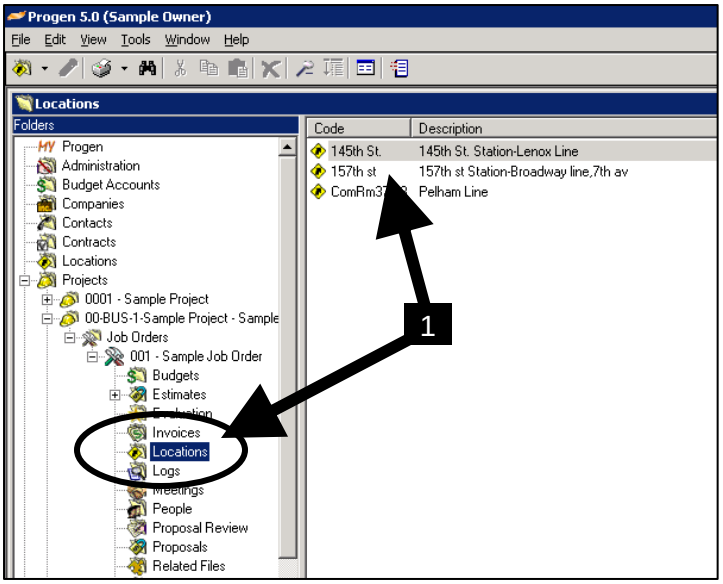


Verify that a Location has been Attached

NOTE

PROGEN has the capability to store multiple locations. For instance, a Job Order may have construction at multiple buildings or sites. Having multiple locations input is not an issue when issuing an NTP.

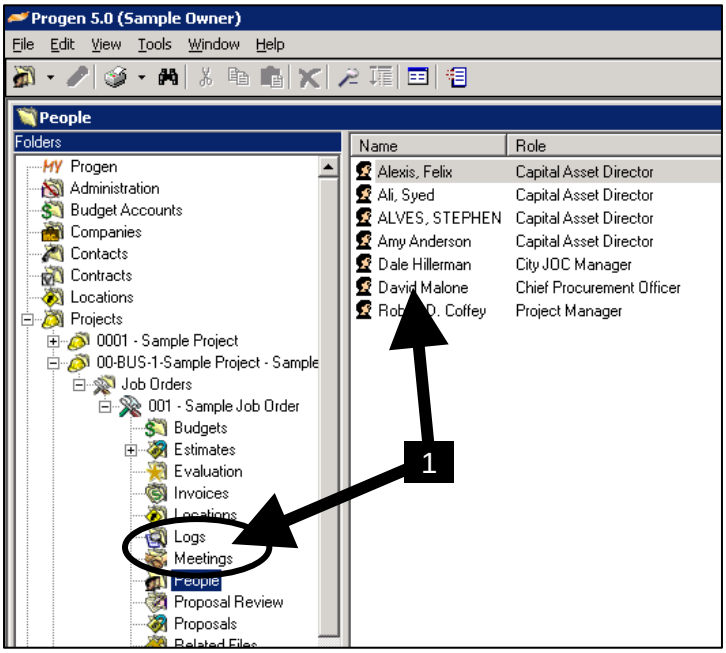
1. Select the 'LOCATIONS' icon. If a location has been attached, it will display in the 'TREEVIEW'.
2. If a location has been attached to the Job Order, proceed to the people section to verify that People have been assigned roles for this Job Order.
3. If no location exists, a location must be attached to the Job Order.
4. To attach a location to a Job Order, drag and drop an existing location from the 'Locations' at the top level of PROGEN.



5. If the location that is needed for this Job Order does not exist, go to Part II, Chapter 4, "Adding a L**ocation".**

Verify that People have been Assigned

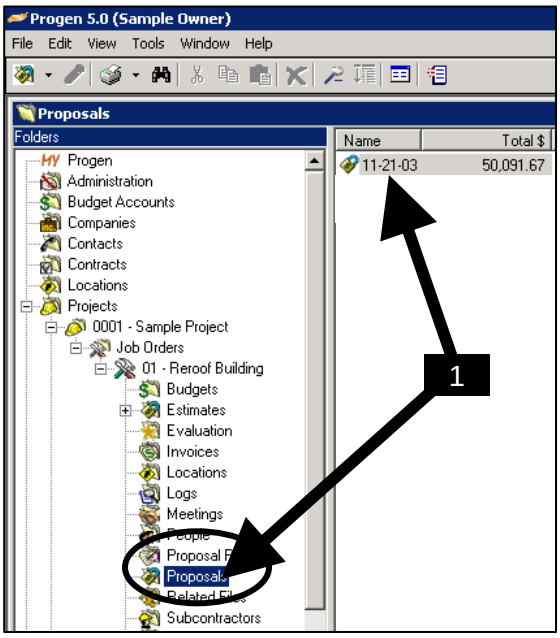
1. Select the 'PEOPLE' icon. If people have been added and their roles assigned, the names and roles will display in the 'TREEVIEW'.
2. If people have been added and their roles assigned to the Job Order, proceed to proposals to verify a proposal has been approved.
3. If no people or roles exist, people must be added and their roles assigned to the Job Order.
4. To add people to a Job Order, drag and drop people from the 'Contacts' at the top level of PROGEN, then double-click to assign their roles.



5. If the people that are needed for this Job Order do not exist, go to P**art II, Chapter 4, "Adding a Contact".**

Verify a Proposal has been Approved

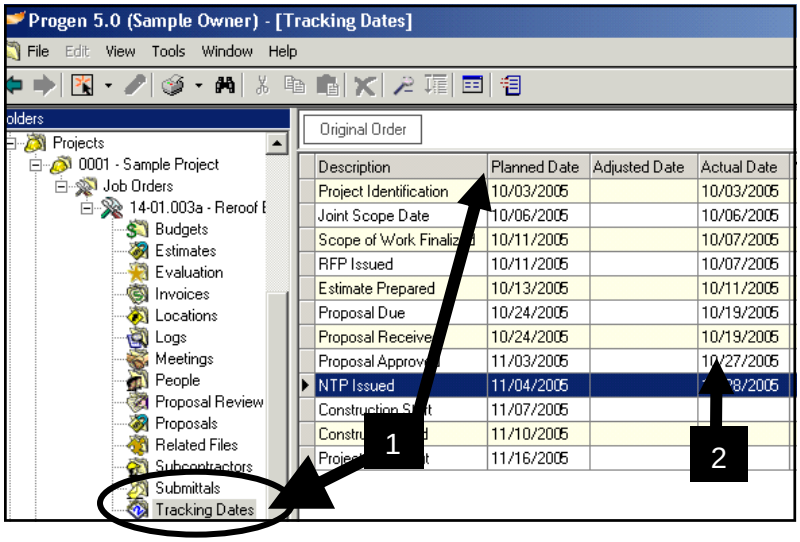
1. Select the 'PROPOSALS' icon. If a proposal has been approved, it will display in the 'TREEVIEW'.
2. If a Proposal has been approved, proceed to Tracking Dates to verify that key dates have been entered.
3. If no Proposal exists, a Proposal must be approved at the Proposal Review level before issuing the Notice Proceed. For instructions on approving a Proposal, go to Part V, Chapter 13, "Reviewing and Approving a Proposal"



Enter the NTP Issued Date

> **NOTE**
>
> If the NTP Issued date (ACTUAL) is not entered, the NTP report may not print correctly.

1. Select the 'TRACKING DATES' icon. If all applicable planned and actual dates have been entered, they will display in the 'TREEVIEW'.
2. Enter the NTP Issued date in the Actual Date column. (If an NTP has NOT yet been issued, this field should be blank – Enter the NTP date at this point).
3. Once the NTP Issued date and all other applicable dates have been entered, proceed to print the Notice to Proceed report.



4. For instructions on entering Tracking Dates, go to Part III, Chapter 6, "Entering Tracking Dates."

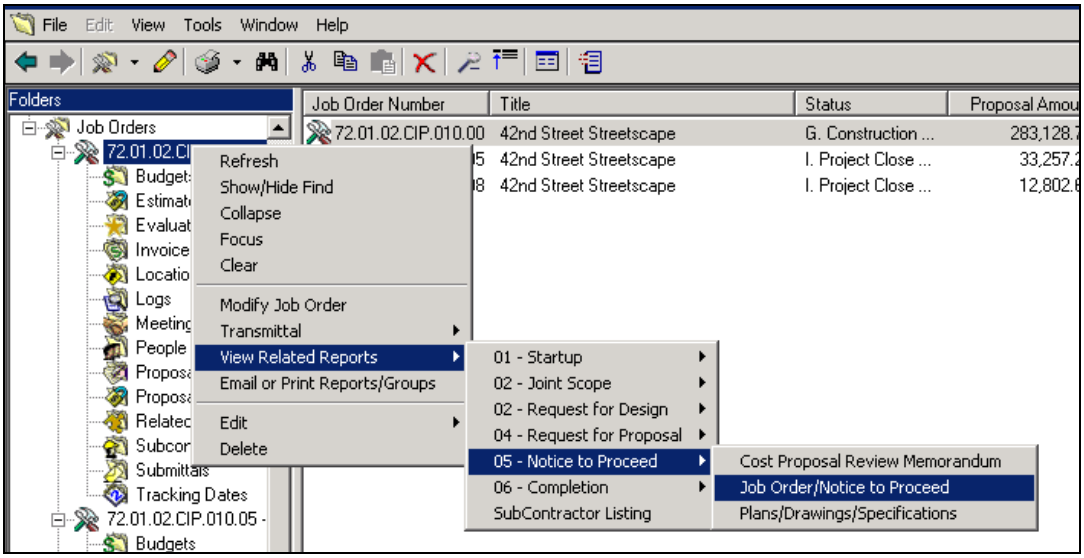
Issue the Notice to Proceed

NOTE

PROGEN may only allow an authorized user to issue an NTP.

1) To view the Notice to Proceed Report, right click on the name of the Job Order and select 'VIEW RELATED REPORTS / NOTICE TO PROCEED'.

   a) The Notice to Proceed report will display in the 'TREEVIEW'. The Project Manager should verify that all the information is complete and accurate.



2) After previewing the report, print the Notice to Proceed by clicking the 'PRINTER' icon, which is located on the top toolbar.

3) Email the Notice to Proceed by clicking the "ENVELOPE' icon, which is located on the upper left side of the viewing window.

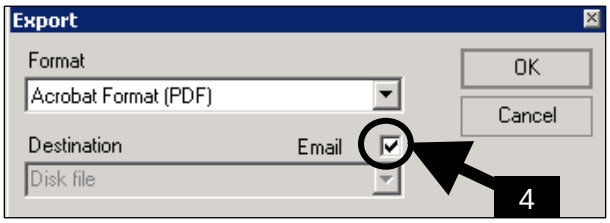
   a) After clicking the 'ENVELOPE' icon, the 'EXPORT' window will open.

TIP

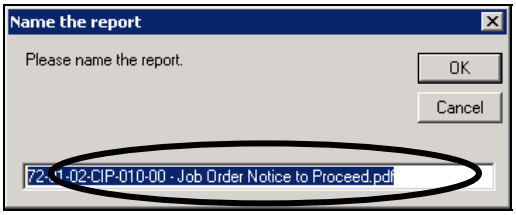
The suggested format type for all reports is an Adobe Acrobat (pdf) file.

4) Email the notice to proceed by checking the email check-box and clicking the 'OK' button.

   a) After clicking the 'OK' button, the 'NAME THE REPORT' window will open.

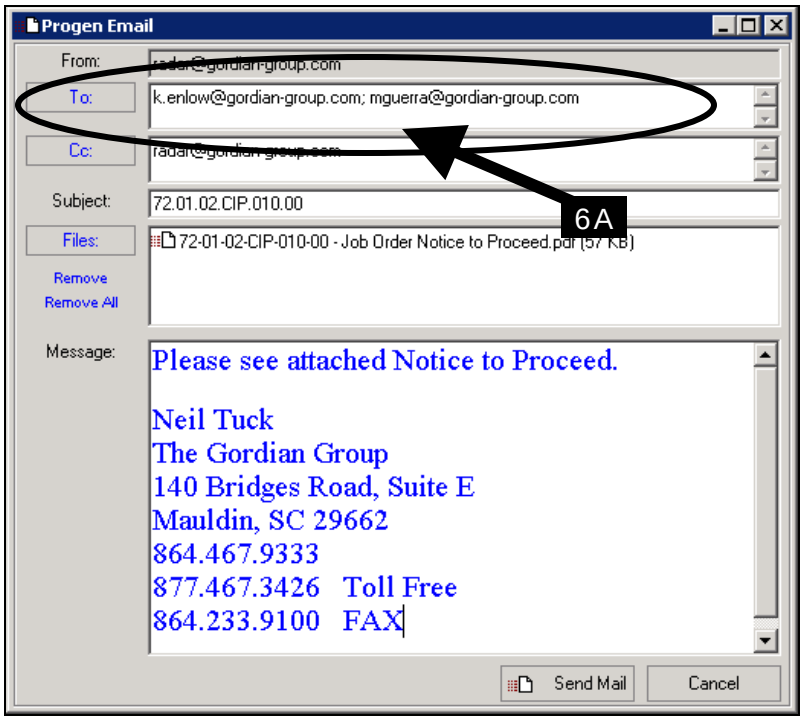


5) The report's name will be entered as a default. If need be, enter a descriptive name for the report then click OK.



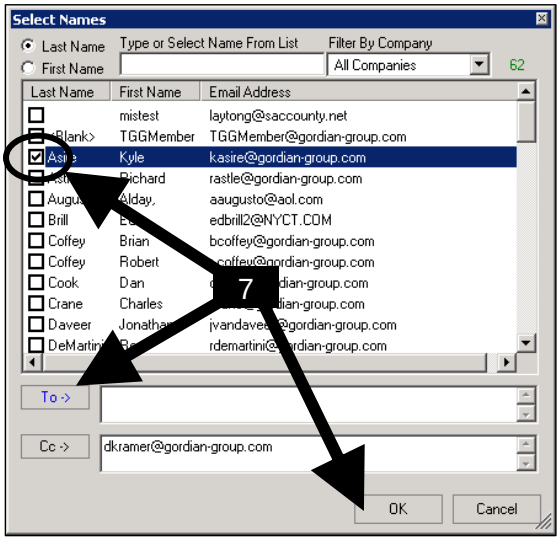
6) Send the Notice to Proceed report by entering the required information for an email:

   a) Click the 'TO:' button to choose the recipient(s) from a stored list of email addresses.



7) Select the recipient(s) by clicking the checkbox next to the recipient's name. After all recipients have been checked, add them to the email list by clicking the 'TO' button and then click 'OK'.

   a) The stored list of email addresses shows only those people who have an email address listed in the Contacts section of PROGEN. To add additional email addresses to the stored list, go to Part 2, Chapter 4, "Adding a Contact".



8) Click the button on the PROGEN email screen to send the email

9) The following window will open.

10) Click 'OK'.

NOTE

The user who is logged into PROGEN will be copied on any email sent from within PROGEN. The user's email address is automatically entered into the From: and the Cc: fields.

NOTE

If the recipient's e-mail address does not appear in the list, the contact information is missing or incomplete. An e-mail address can still be manually entered in the 'To:' field

TECHNICAL

Some email systems WILL NOT deliver or accept emails without a 'SUBJECT' entered.

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Part VI – Maintaining the Project

Chapter 15 – Maintaining the Project

✓ NOTE

See PART 1 for information on launching and logging on to PROGEN.

A necessary function of a Job Order Contract is keeping all the data up-to-date. This section will explain the most critical areas that can be maintained every time the user accesses PROGEN.

Updating Tracking Dates

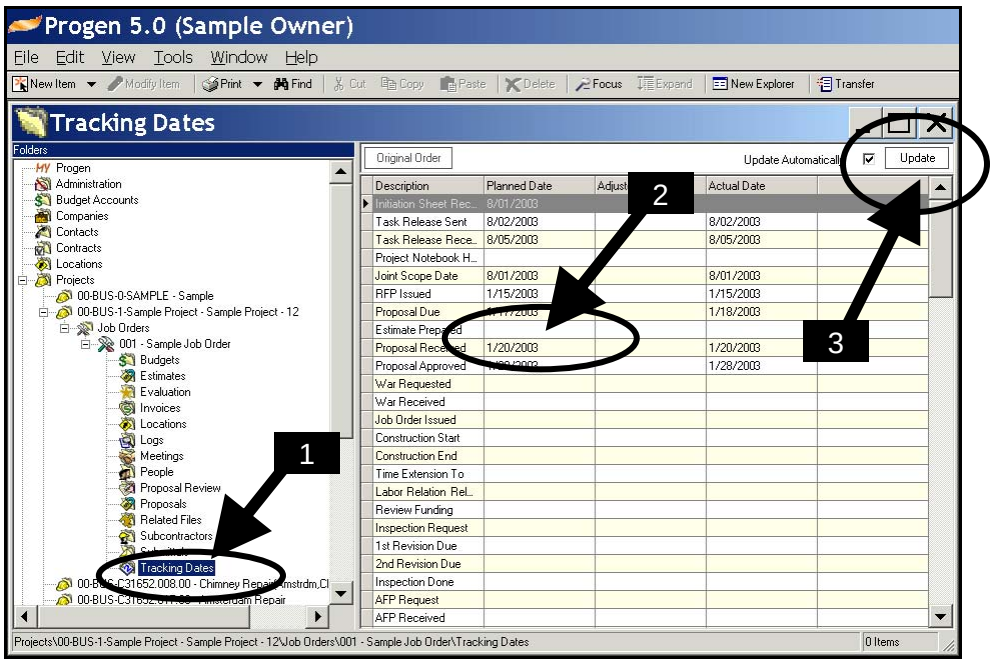
TIP

If 'UPDATE AUTOMATICALLY' is checked then the 'UPDATE' button will never need to be clicked.

1) Start by selecting the 'TRACKING DATES' folder. The list of dates will be displayed on the right side, or 'LISTVIEW' side, of the window.

2) In the LISTVIEW' window, update the date fields as needed.

3) If the 'UPDATE AUTOMATICALLY' check box is not checked then click the 'UPDATE' button.



✓ NOTE

Planned dates are dates that, when entered, will happen in the future. Actual dates are the dates which the event actually happened.

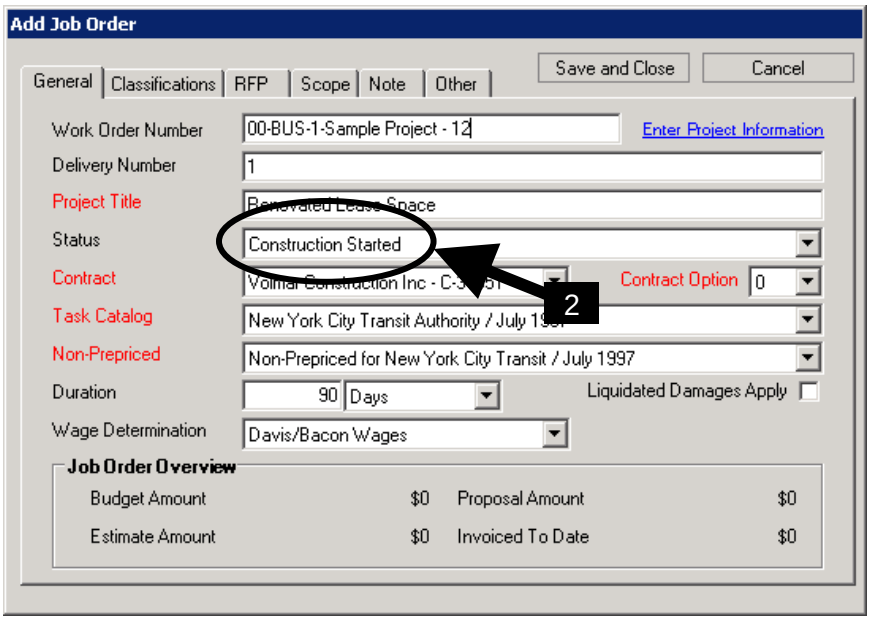
TIP

Keeping the projects up to date a little at a time is the easiest method for having current and accurate reports available.

4) From the 'TRACKING DATES' window, the user can see the whole process and which steps need to be updated, approved or issued. It is a quick way to see which information needs updating.

Updating Status on Job Order

1) Right click on the Job Order and select 'MODIFY JOB ORDER'.
2) Select the Status drop-down menu and choose the appropriate status.
3) Click 'SAVE AND CLOSE' when finished.

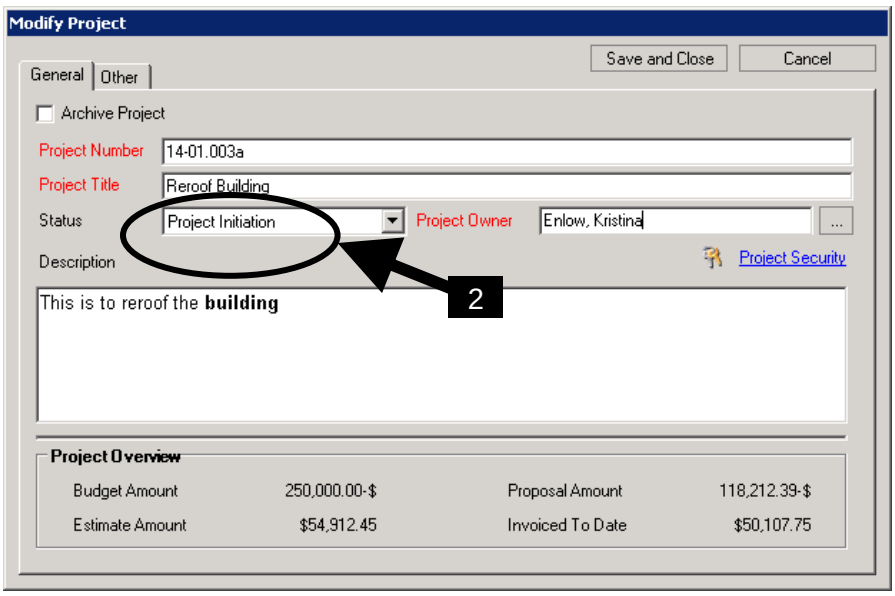


Updating the Status of the Project

TIP

The status of the Project may not be the same as the Job Order. The Project status should reflect the status of all Job Orders within the Project.

1) Right click on the Project and select 'MODIFY PROJECT'.
2) Select the Status drop-down menu and choose the appropriate status.
3) Click 'SAVE AND CLOSE' when finished.



Chapter 16 – Requesting Submittals

The submittal log tracks submittals from the contractor to the owner for each project. The submittal log was designed with a great deal of flexibility so that each agency could adapt it to their way of handling submittals.

Entering Data in the 'ADD SUBMITTAL' Window

✓ NOTE

See PART 1 for information on launching and logging on to PROGEN.

1) From this list at the Job Order level, select the 'SUBMITTALS' folder. Right click on it to display a drop down menu. Scroll down the list until 'ADD SUBMITTAL' is highlighted and click it.

2) In the 'ADD SUBMITTAL' window, fill in all applicable fields.

   a) **Link to Library** – Any item from the submittal library can be chosen. This is where the most commonly used submittals are stored.

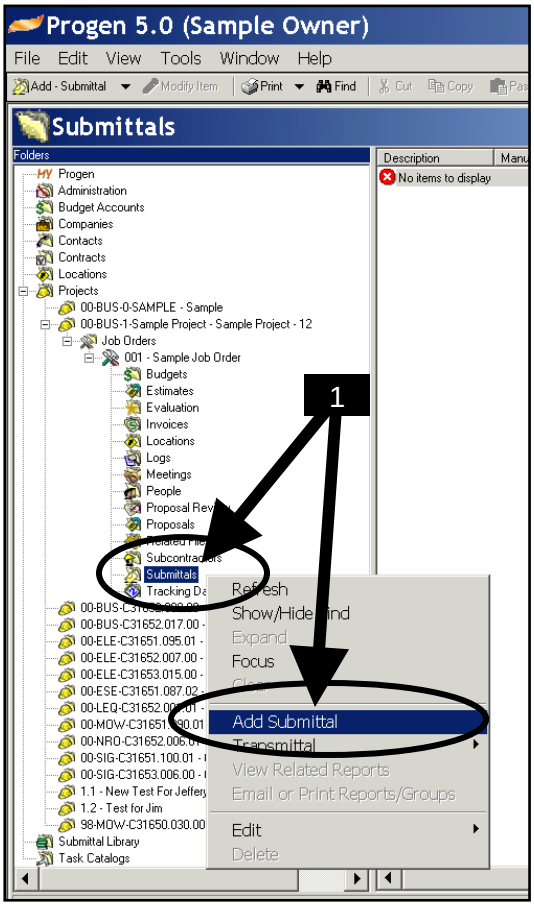
   b) **Description** – The common name of the item.

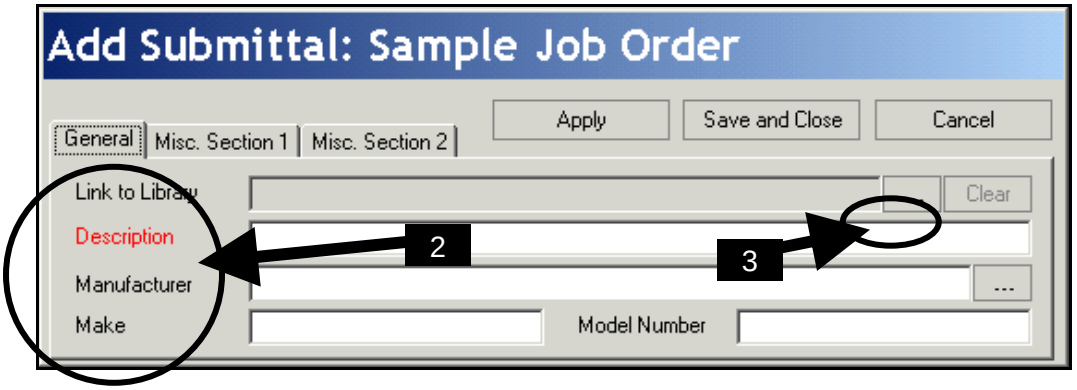
   c) **Manufacturer** – The company that makes the item.

   d) **Make** – The style of the item.

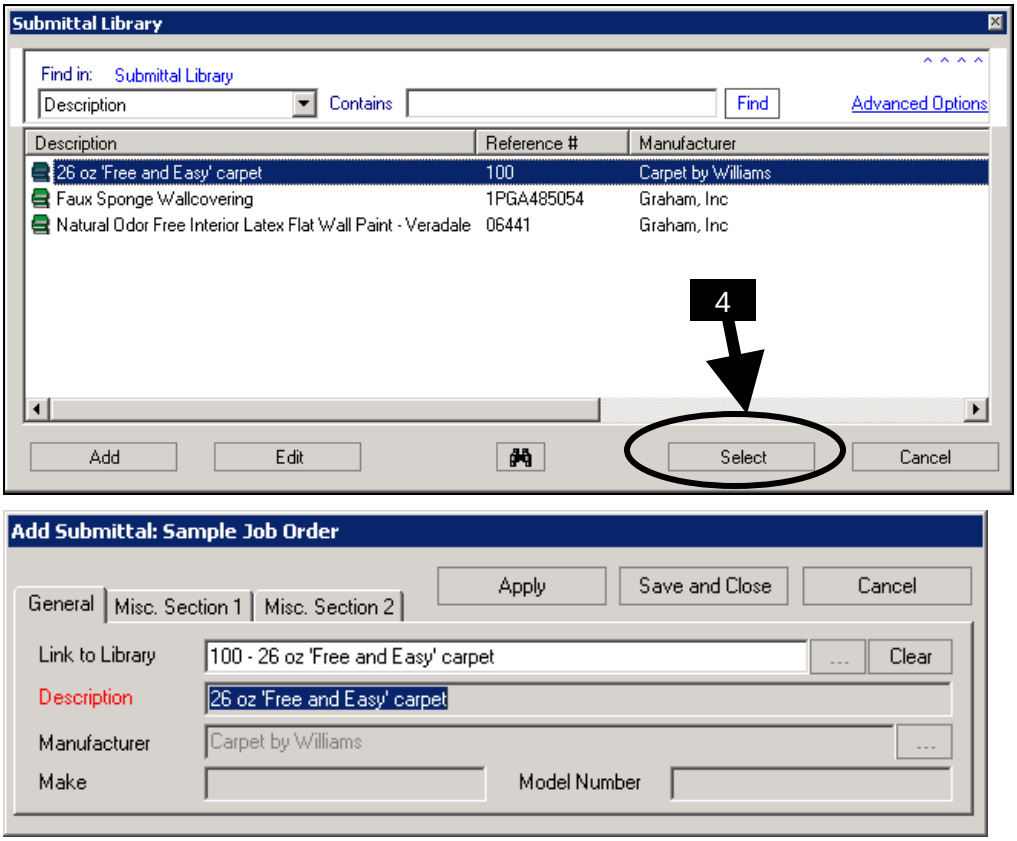
   e) **Model Number** – The series of the make.

3) Click the Points of Ellipsis (...) to the right of 'LINK TO LIBRARY' to get the Submittal Library selections.

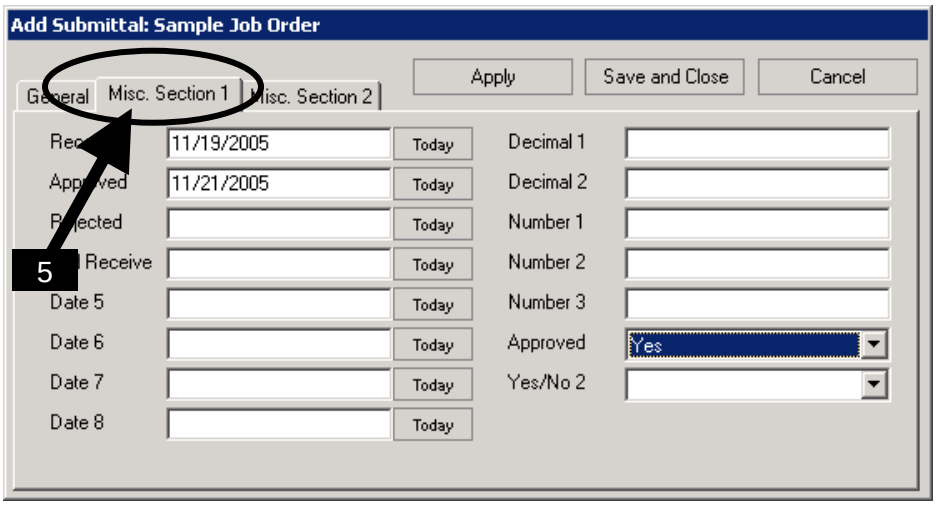




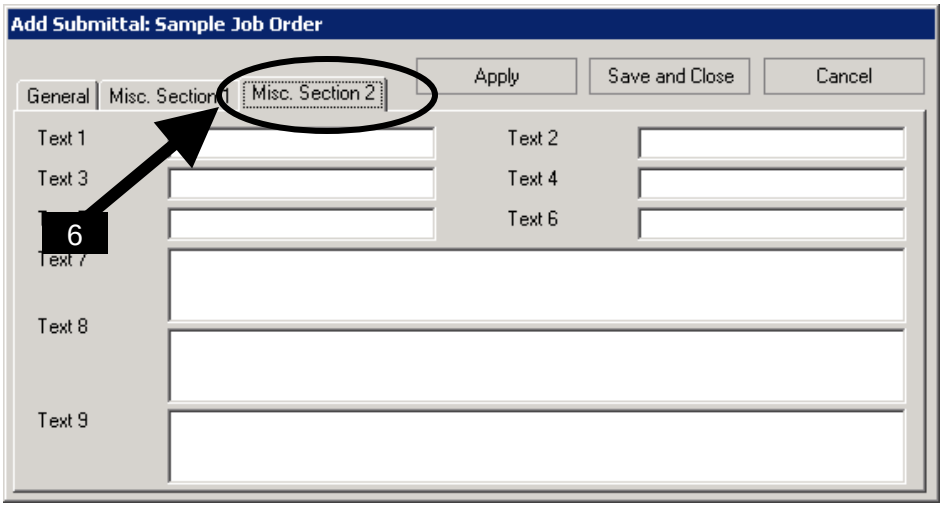
4) Click the 'SELECT' button when done.



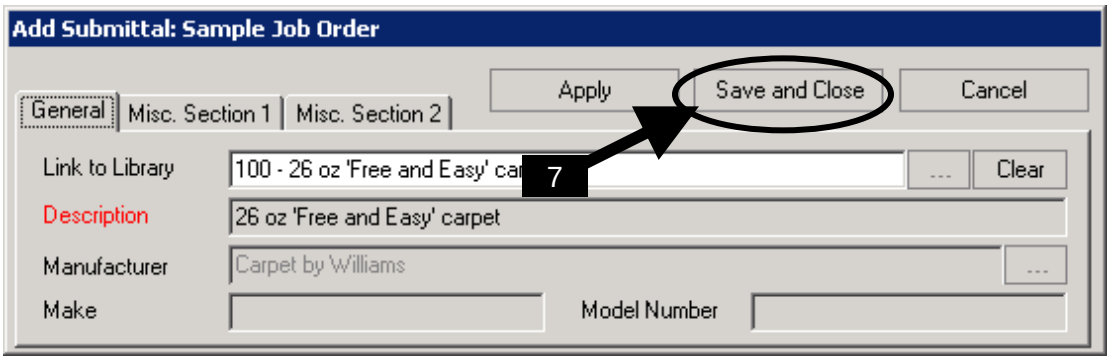
5) The 'MISC. SECTION 1' tab allows for the tracking of the submittal process.



6) The ‘Misc. Section 2’ tab gives any additional information that is relevant to the item.



7) Click on the ‘Save and Close’ button.



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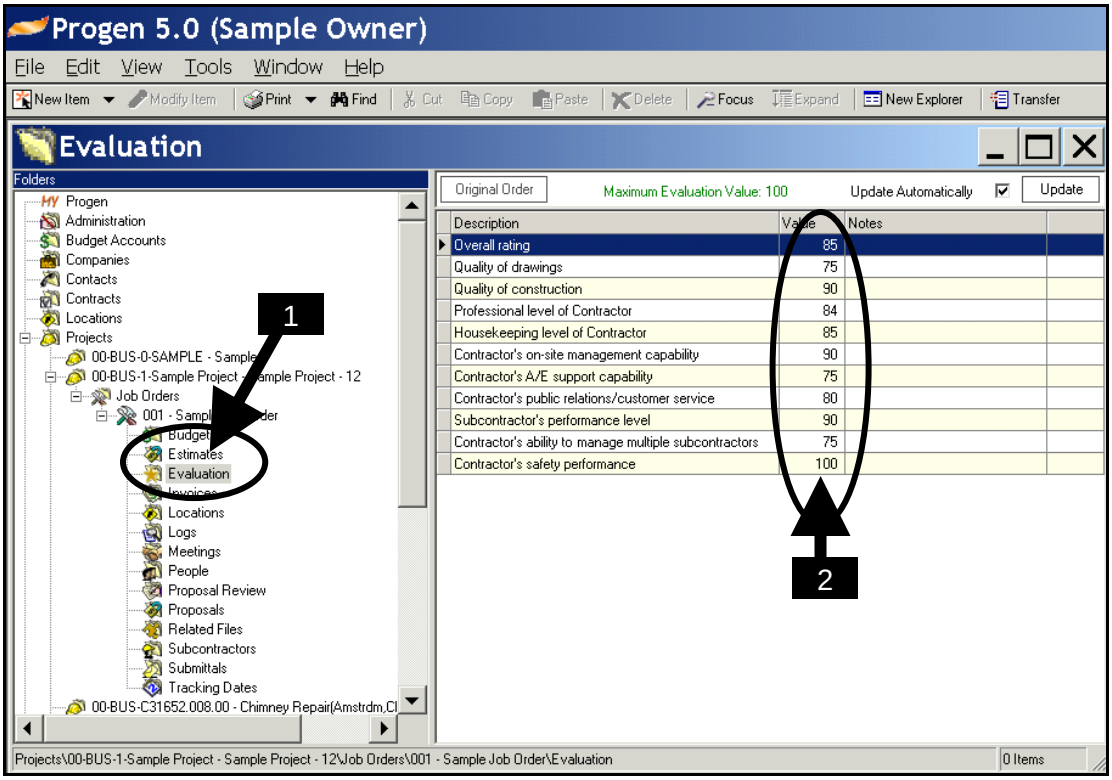
Chapter 17 – Evaluating the Contractor

This allows for the evaluation of the contractor's performance. The criteria for the evaluation are setup by the PROGEN administrator. The administrator will also setup the maximum criteria value. This screen is a data grid and the information can be entered directly on the screen.

Entering Data in the 'EVALUATION' Screen

1) Start by selecting the 'EVALUATION' folder under the desired Job Order. There will be a list of dates on the 'LISTVIEW' side of the window that may need updating.

2) The user can now enter the values and any notes related to each evaluation item.



NOTE

Make sure the 'UPDATE AUTOMATICALLY' checkbox is checked.

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Chapter 18 – Contractor Invoicing

The invoicing feature allows the contractor and owner to create and manage invoices for a job order. The owner has the ability to track the progress of the payments by updating the dates per invoice.

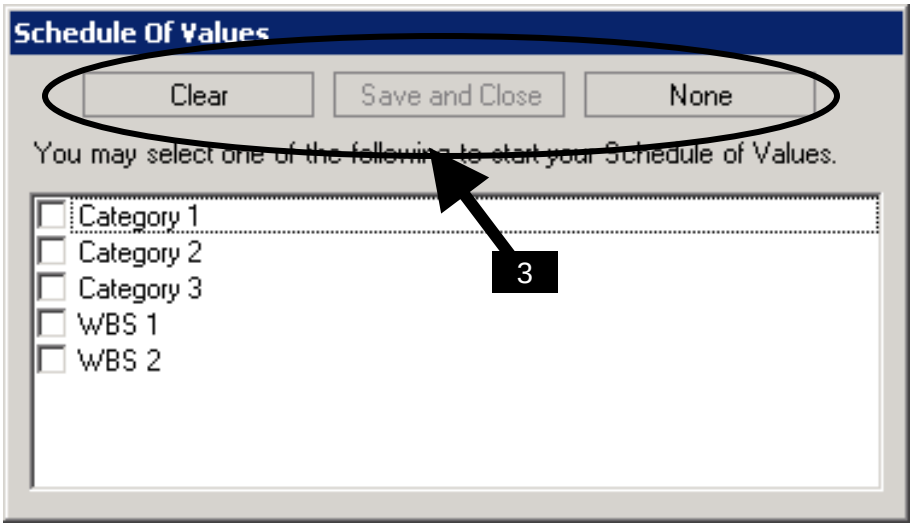
NOTE

See PART 1 for information on launching and logging on to PROGEN.

Creating a Schedule of Values

1) Right click on 'INVOICES' located under a specific Job Order in the 'TREEVIEW'. Then scroll through the drop down menu and click on 'ADD INVOICE'.

2) If this is the first invoice the user will get a screen allowing the selection of WBSs or Categories for the schedule of values.



RIGHT CLICK

RIGHT CLICKING an invoice will display the 'MODIFY INVOICE' menu.

3) This window will allow the user to select the starting schedule of values. Only one item can be selected in the list.

   a) Clicking the 'CLEAR' button will uncheck any item that is checked.

   b) Clicking the 'NONE' button indicates that none of the items will be used as the starting schedule of values.

   c) Click 'SAVE AND CLOSE' to enter this information for the invoice.

Adding an Invoice

TIP

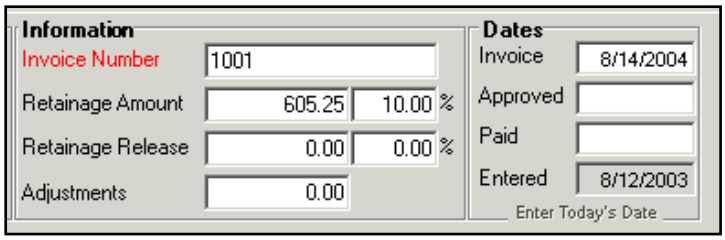
The Gordian Group recommends using the job order number followed by -01 or -02, etc.

1) Information Screen

   a) Enter an invoice number.

   b) Retainage Amount

      i) The user may enter a retainage amount by a percentage or by a specific value. This



amount will be held from the invoice amount. The retainage amount is for this invoice only. The value will change as the schedule of values are filled in.

c) Retainage Release

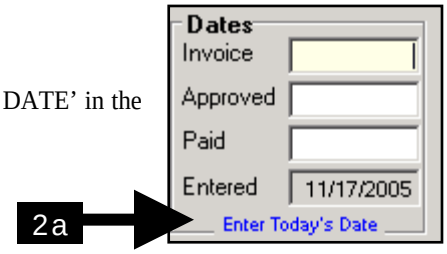
i) The user may enter a retainage release amount by a percentage or by a specific dollar value. This amount will be released for the invoice.

d) Adjustments

i) Any additional value that may need to be added or deducted from the invoice amount. Values such as liquidated damages apply here.

2) Dates

a) By clicking on the blue link, it will 'ENTER TODAY'S DATE' in the selected box.

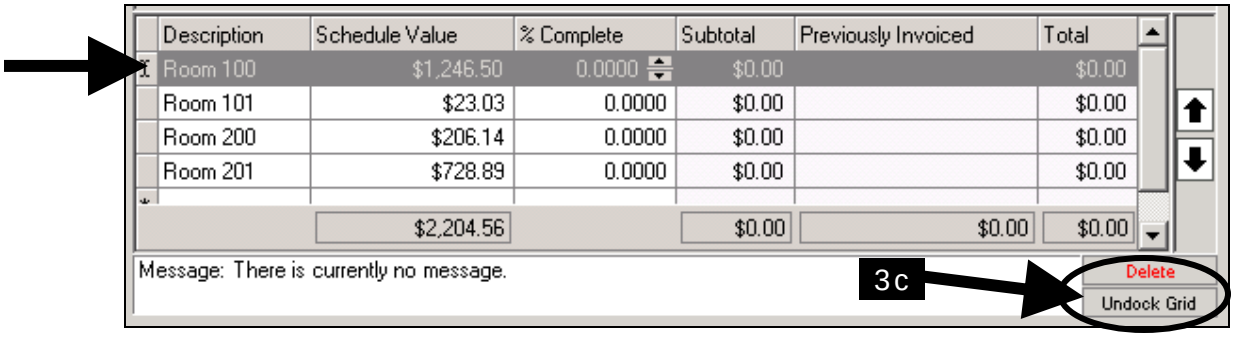


3) Schedule of Values - The data grid will populate with the description and values of the WBS or Category that was chosen for the job order. If none were chosen the list may be customized.

a) The schedule of values may be changed as a user sees fit. The user may add new descriptions based on their needs. The user will also need to enter the dollar value in the column 'SCHEDULE VALUE'. The total values in this column cannot be greater than the contract amount

b) The user also enters the data in the column '% COMPLETE'. If the user is 100% complete with a project then 100 will be entered in the percent complete column.

c) Click the 'UNDOCK GRID' button to have a floating 'SCHEDULE OF VALUES' window.



Editing/Modifying an Invoice

✓ NOTE

The user may only edit the most recent invoice. Previous invoices are set as read-only.

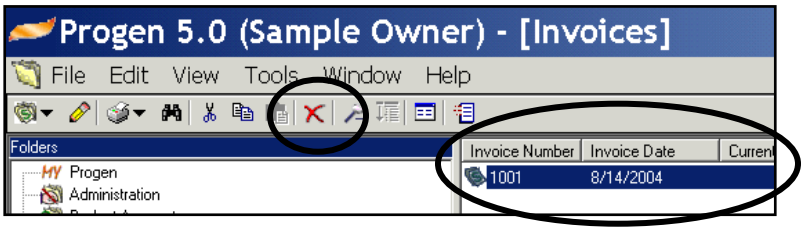
1) To view the 'MODIFY INVOICE' screen, right click on the invoice and select 'MODIFY INVOICE' or double click on the invoice to open the 'MODIFY INVOICE' window.

2) Make any corrections as needed. After making any changes, be sure to click the 'SAVE AND CLOSE' button.

Delete an Invoice

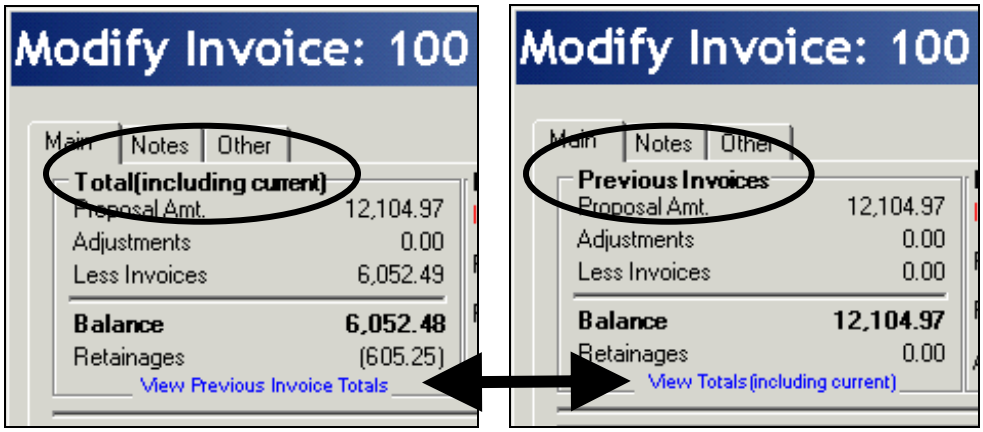
1) Click on an invoice to highlight it blue.

2) Click on the RED 'X' in the toolbar.



Navigating the Costs Window

1) The upper left part of the window contains an Invoice Summary. Clicking on the blue link will toggle between 'TOTAL (INCLUDING CURRENT)' menu and the 'PREVIOUS INVOICES' menu.



a) 'TOTAL (INCLUDING CURRENT)' menu:

i) Proposal Amount: The total current proposal value on the job order.

ii) Adjustments: Any additional money that is not included in the job order proposal. i.e. liquidated damages, etc.

iii) Less Invoices: The total amount invoiced to date including the current invoice.

iv) Balance: The balance to be paid not including any retainages.

b) 'PREVIOUS INVOICES' menu:

i) Proposal Amount: Previous proposal value on the job order.

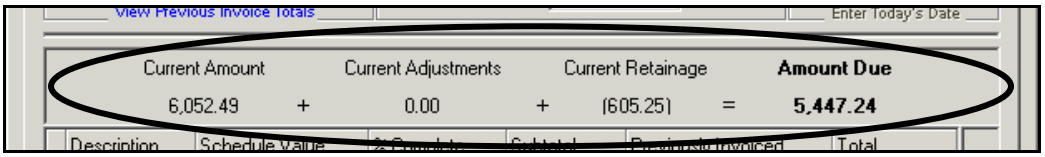
ii) Adjustments: Any additional money that is not included in the job order proposal that was in a previous invoice. i.e. liquidated damages, etc. for this invoice only.

iii) Less Invoices: The total amount of previously invoices.

iv) Balance: The balance of the proposal amount to be paid.

v) Retainages: The previous retainage amounts.

2) 'CURRENT INVOICE' menu is in the middle of the window and shows:



a) Current Amount: Total amount of invoice.

b) Current Adjustments: Any additional money that is not included in the job order proposal. i.e. liquidated damages, etc.

c) Current Retainage: The retainage amount on this invoice.

d) Amount Due: The amount to be paid plus or minus any adjustments and/or retainages.

Additional Information

1) There is a 'NOTES' tab at the top of the window

a) Any additional information that needs to be stored with the invoice should be added here. The text in this field can be formatted.

2) An 'OTHER' tab has been added for any miscellaneous invoice items that may need to be tracked.

Updating Invoice Dates

1) Go to 'INVOICES' under Job Order.

2) Double click on the invoice that needs to be updated.

3) Fill in the appropriate date fields for approved and/or paid.

Chapter 19 –Subcontractor Payments

The Subcontractor section in the Job Order is used to track subcontracts and invoices for the prime JOC contractor. It is transmitted to the client in an effort to track subcontractor participation business statistics.

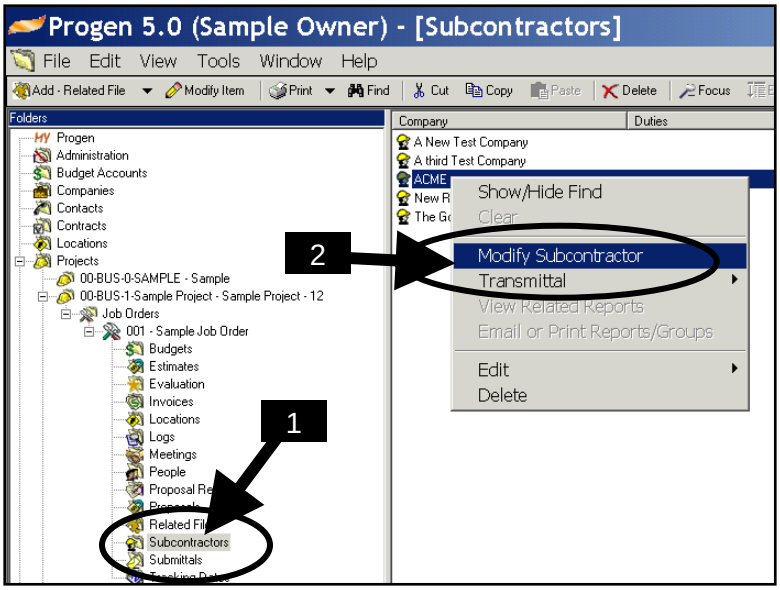
NOTE

See PART 1 for information on launching and logging on to PROGEN.

Navigating to the 'MODIFY SUBCONTRACTOR' Window

1) From this list, select the 'SUBCONTRACTORS' folder.

2) Right Click on a subcontractor in the 'TREEVIEW' side to see a drop down menu. Scroll down the list and click 'MODIFY SUBCONTRACTOR'.



Entering Payment Information

NOTE

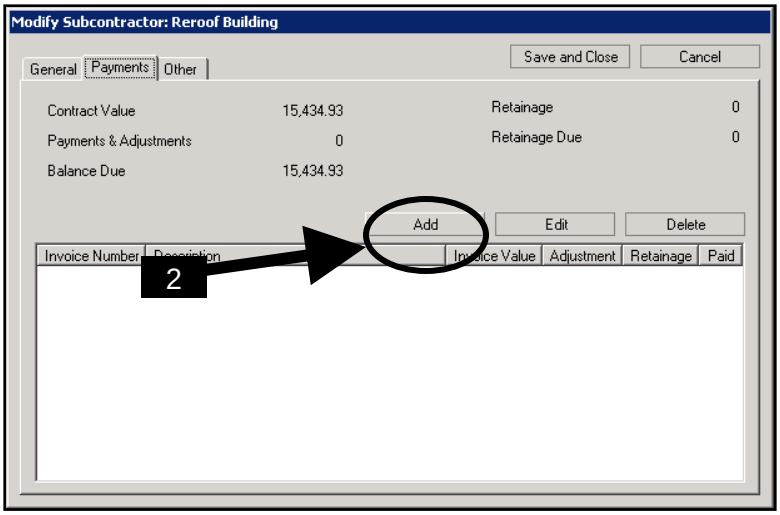
Once an invoice has been paid be sure to go back and click the 'PAID' checkbox.

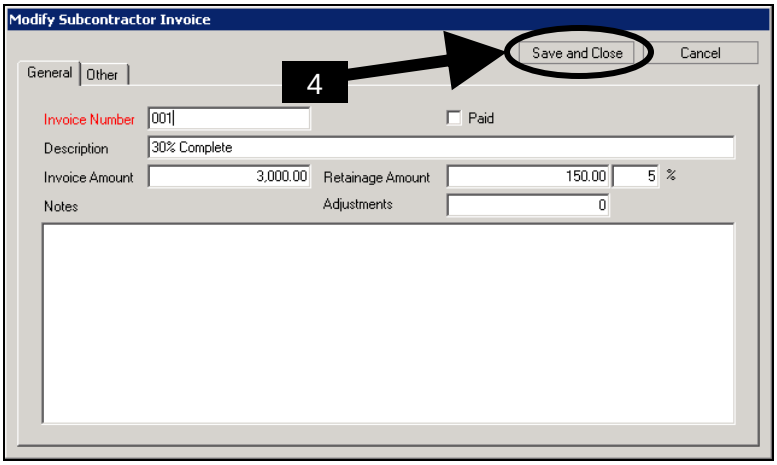
1) In the 'MODIFY SUBCONTRACTOR' window, click the 'PAYMENTS' tab.

2) Click the 'ADD' button. The 'ADD SUBCONTRACTOR INVOICE' window will display.

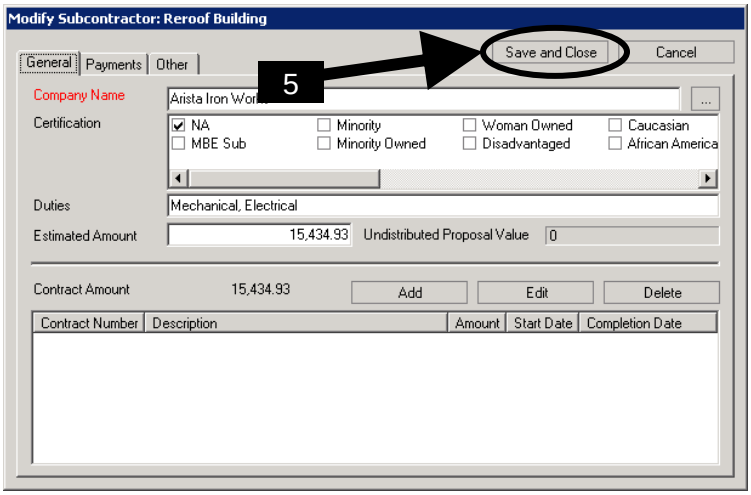
3) Enter all applicable information in the window.

4) Click on the 'SAVE AND CLOSE' button.





5) Click ‘SAVE AND CLOSE’ on the ’MODIFY SUBCONTRACTOR’ window.



6) Repeat the above steps for each applicable subcontractor.

Part VII - Reports

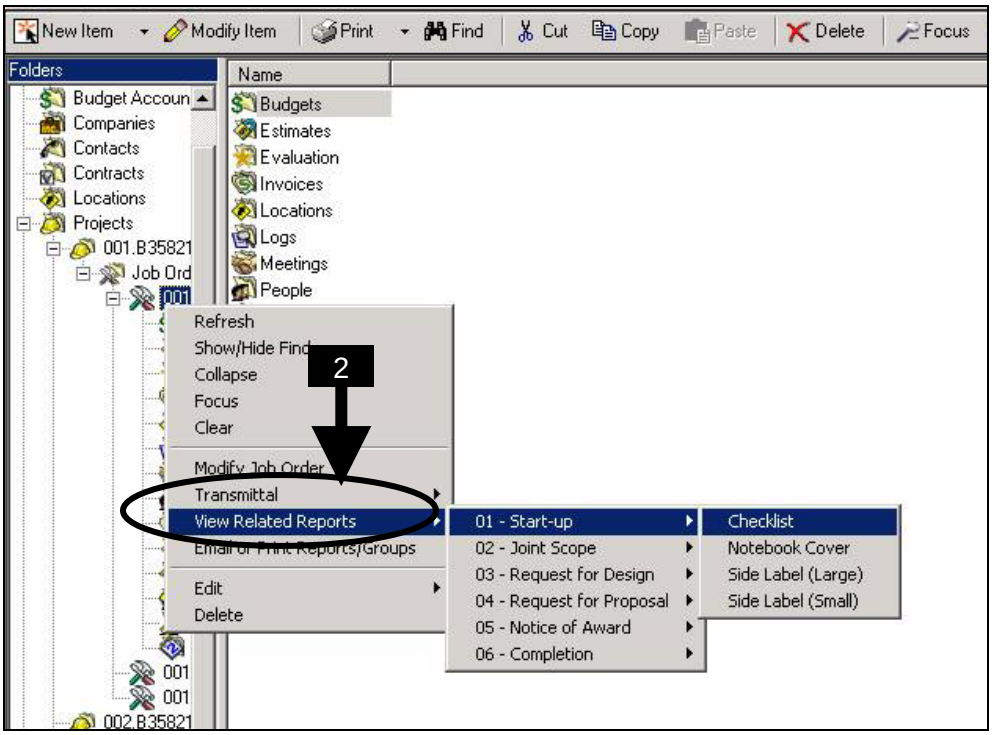
Chapter 20 – Viewing Reports

Reports allow a user to view information in a readable format based on all of the data input from users. Reports in PROGEN can be located in any folder. There are three main levels to View, Print, or Email reports from: the Project, Job Order and the Proposal level. All clients have customized reports. The sample reports shown in the remaining chapters will show the basic process for Viewing, Printing, and Emailing reports.

How to Preview Reports

1) Right click on the folder and choose 'VIEW RELATED REPORTS'. Another drop down menu will appear with a list of related reports.

2) Select the report to view and it will display in the 'LISTVIEW' side of the window.



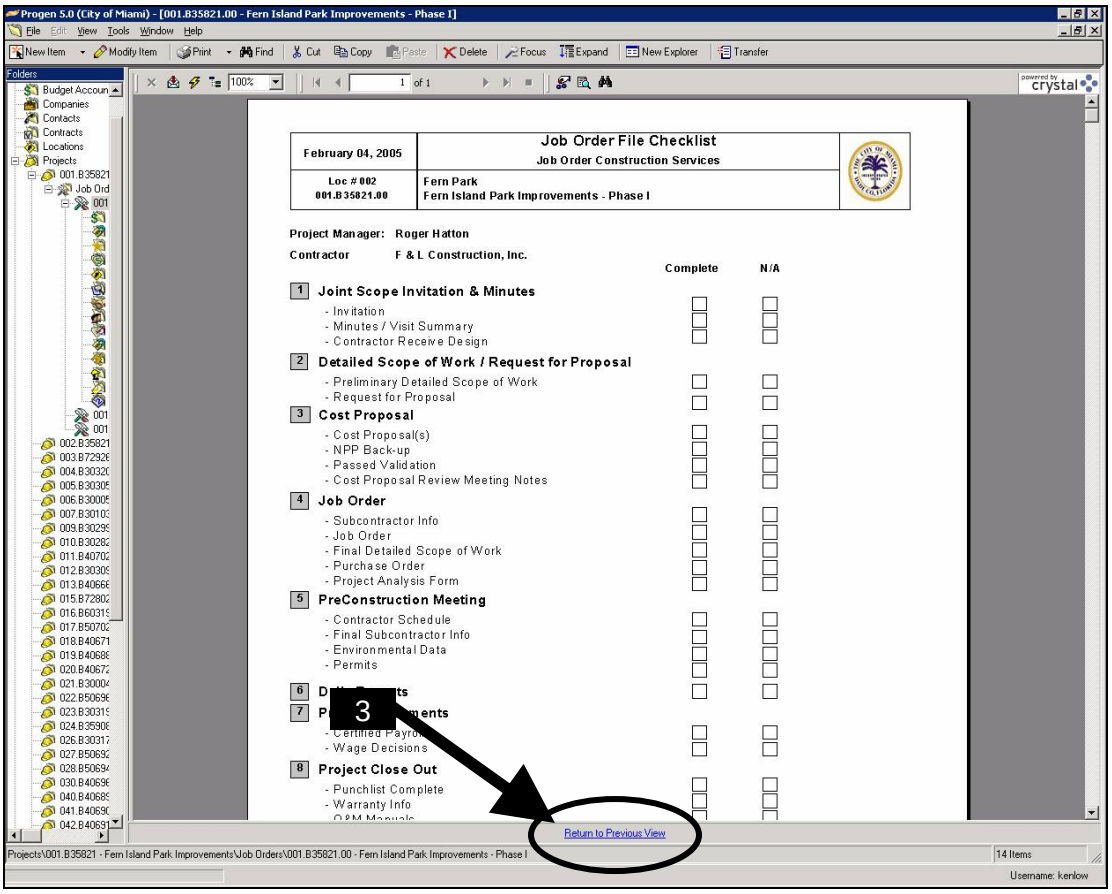
NOTE

If 'VIEW RELATED REPORTS' is grayed out, then there are no reports available or the user does not have access to view reports associated with that folder.

TIP

Always make sure to view the reports for accuracy and completeness before they are emailed or printed.

3) If information is missing from the report, click on the bottom of the window on the 'RETURN TO PREVIOUS VIEW' (blue link). Proceed as normal to update the information.



Chapter 21 – Print Reports

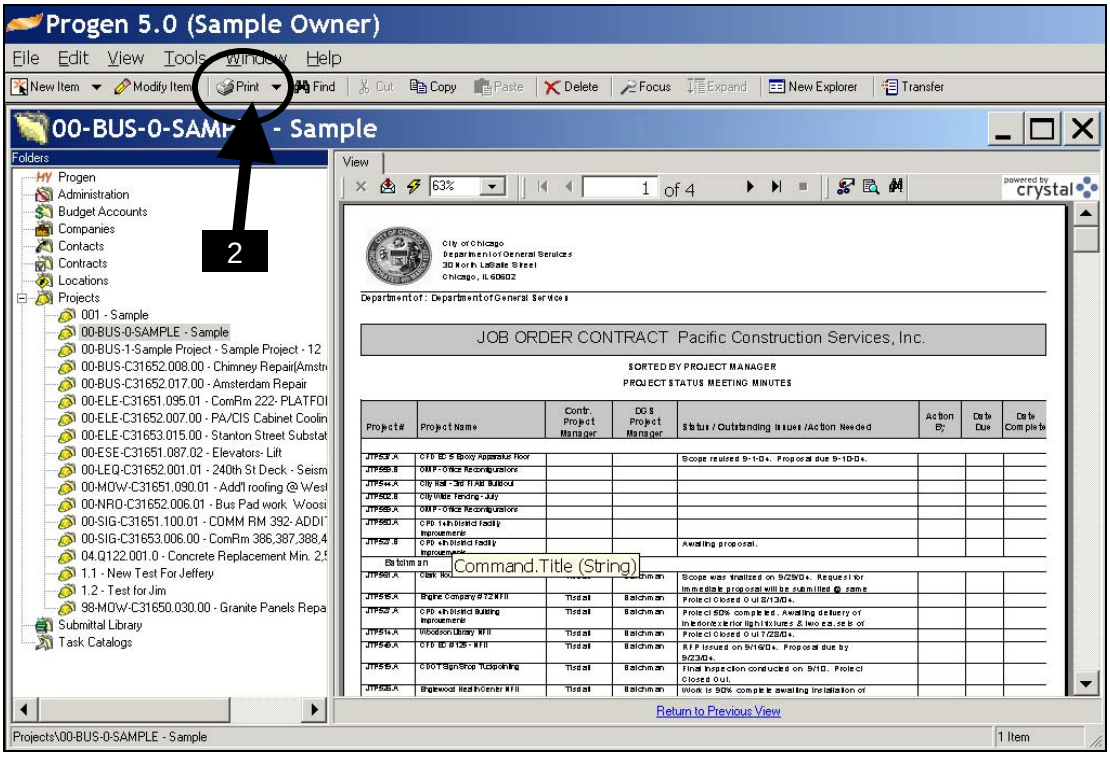
Print a Single Report from the Preview Screen

NOTE

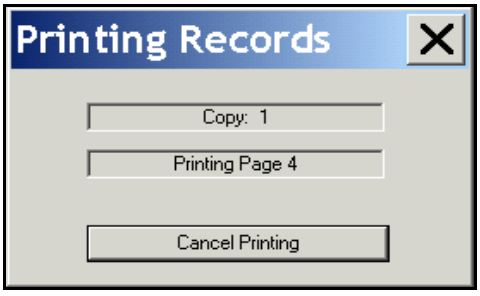
For more information on previewing a report see Chapter 20.

1) Make sure that the report needed to print is previewed in the 'LISTVIEW' side of the window.

2) Click the 'PRINT' button in the toolbar to print all the pages of the report shown in the 'LISTVIEW' to the default printer.



3) The 'PRINTING RECORDS' window will display. When it disappears the report has been sent to the printer's queue.



TECHNICAL

If only specific pages need to be printed or different printer needs to be used, choose 'PRINT' from the 'FILE' menu and make the selections.

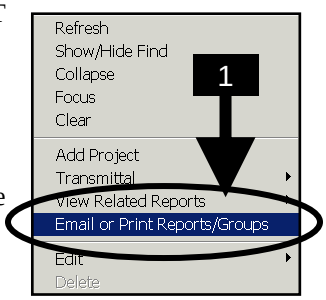
NOTE

If the print out has 'gibberish' or the printer isn't receiving the data, then call Technical Support at 877-467-3426 and one of the team members will assist in determining the problem and help in finding a solution.

Print Multiple Reports

Printing multiple reports is best accomplished by going to 'EMAIL OR PRINT REPORTS/GROUPS'.

1) Right click on the corresponding folder and choose 'EMAIL OR PRINT REPORTS/GROUPS'.

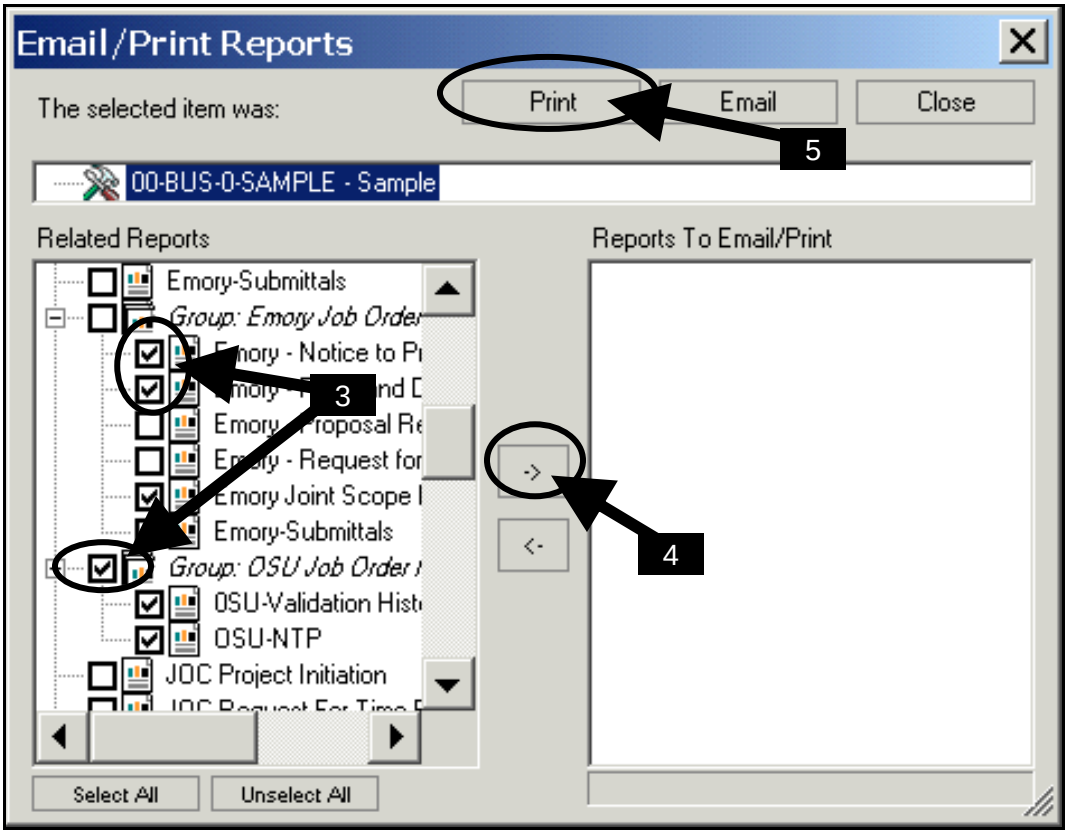


2) The 'EMAIL/PRINT REPORTS' window will open.

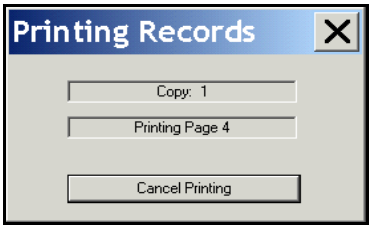
3) To select a report, place a check in the box to the left of the report.

4) Click the (right arrow) to move the selected reports to the 'REPORTS TO EMAIL/PRINT' window.

5) Click the 'PRINT' button.



6) The 'PRINTING RECORDS' window will display. When it disappears, the selected reports have been sent to the printer's queue.

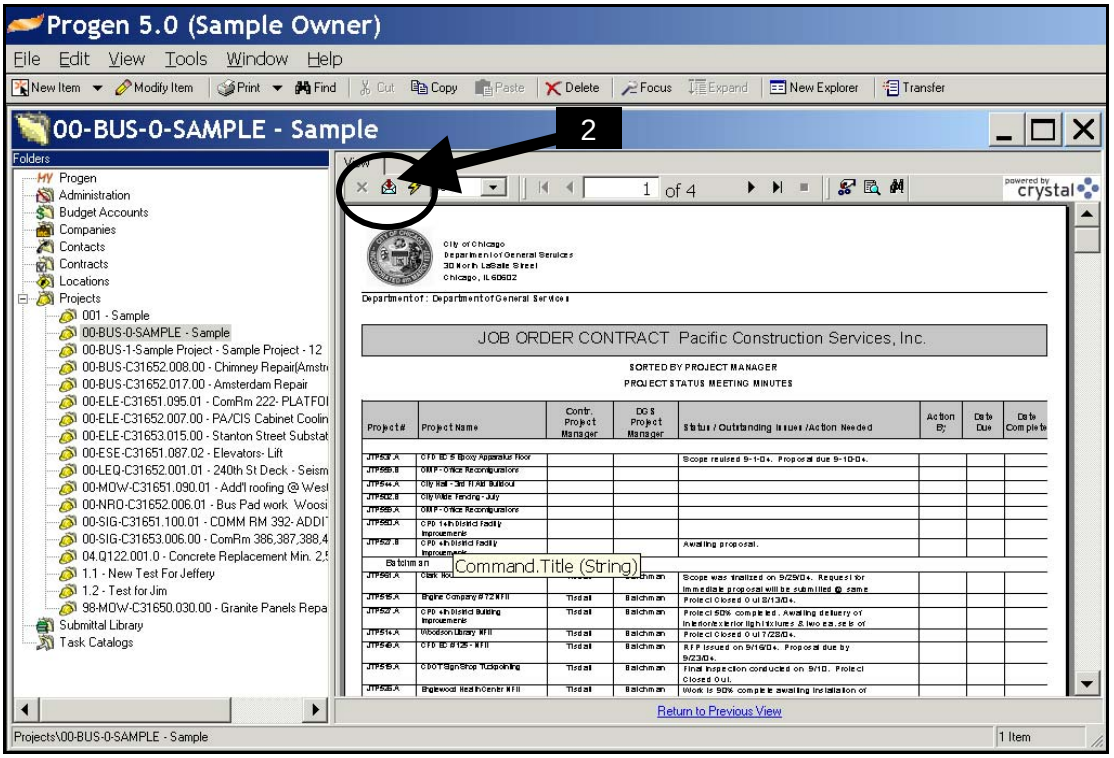


Chapter 22 – Email Reports

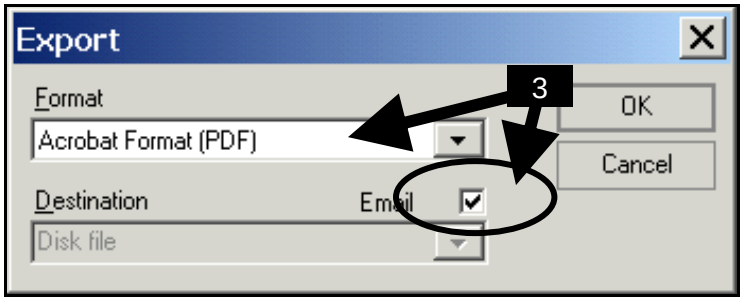
Email a Single Report from the Preview Screen

1) Make sure that the report to email is previewed on the 'LISTVIEW' side of the window.

2) Click the 'EXPORT REPORT' envelope icon above the report shown in the 'LISTVIEW'



3) In the 'EXPORT' window check the 'EMAIL' box and then click 'OK'. Leave the default format as Acrobat format.



TIP

Save the Report in PDF file format. Other formats may not print the report as expected.

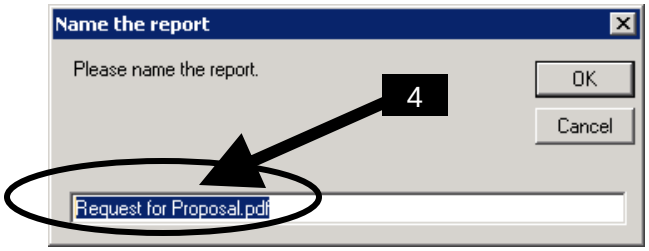
WARNING

Do not use PERIODS or other punctuations in 'Name the Report'. Use hyphens or a space instead. WINDOWS will not recognize the file as a PDF file if there is a punctuation within the filename.

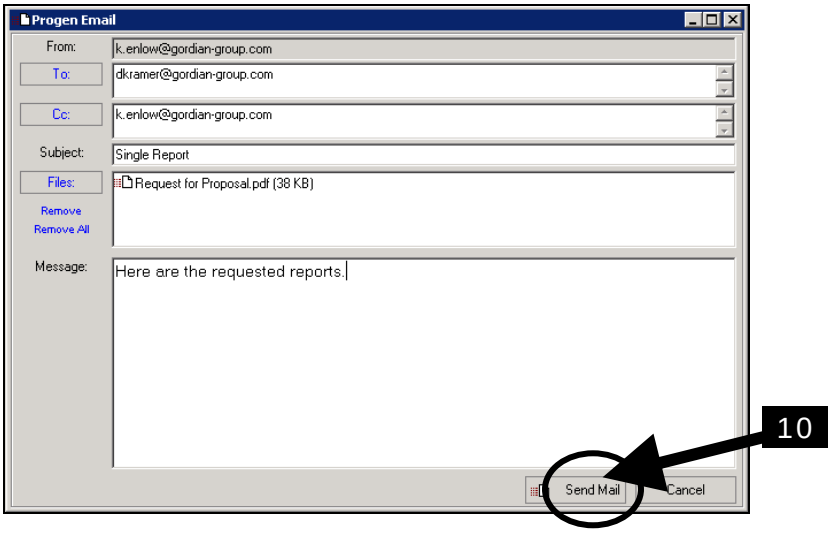
TIP

Add a 'Subject' to the email. Some email systems will reject emails without a subject.

4) The 'NAME THE REPORT' window will display. When naming the report, the default name may be used. But, we suggest adding the job number in front of it so the correct email can be located easier. Click OK.



5) The 'PROGEN EMAIL' window will open. Enter a subject in the subject field.



6) Enter any message to the recipient(s) in the message field.

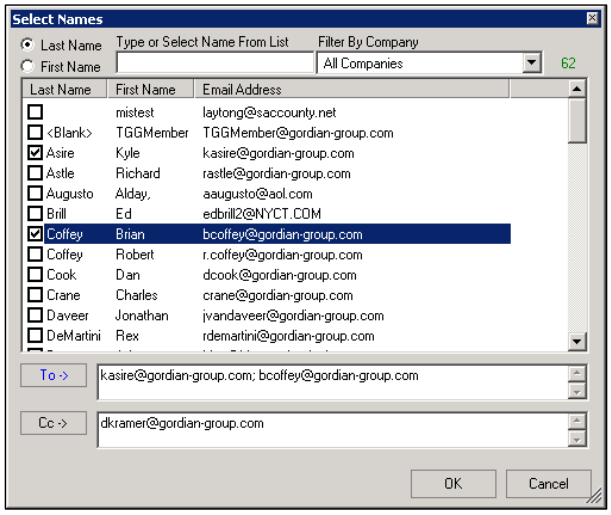
7) Click the 'TO:' To: button to choose a recipient(s).

8) The 'SELECT NAMES' window will open. This listing shows only the contacts that have an email address entered in PROGEN.

   a) Click the check box next to the desired name(s).

   b) Click the 'TO - >' To -> button to enter the checked name(s) in the box.

9) Click the 'OK' button and the 'SELECT NAMES' window will close.



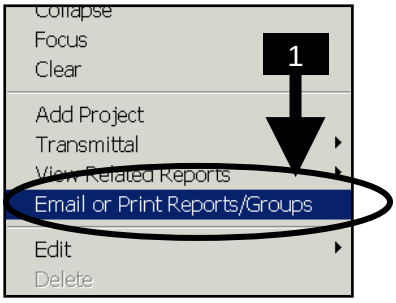
10) Click the Send Mail button on the 'PROGEN EMAIL' window to send the email. After receiving the message "The message was sent successfully," click 'OK'

Email Multiple Reports

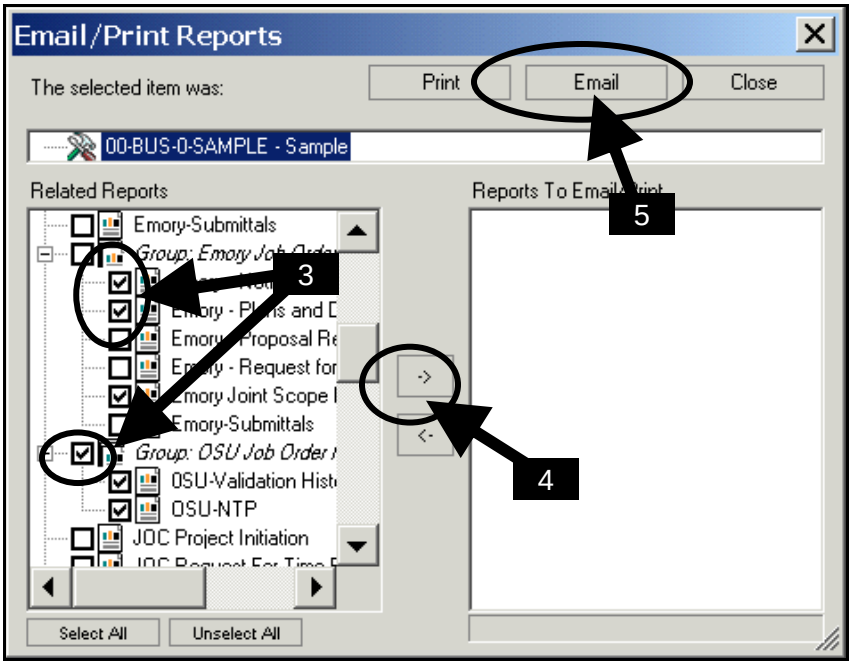
TIP

Always make sure to view the reports for accuracy and completeness before they are emailed.

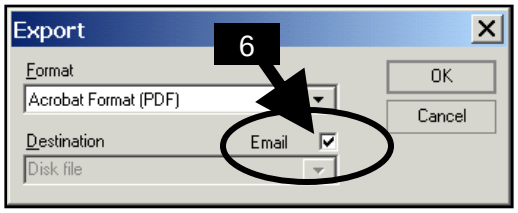
Emailing multiple reports is best accomplished by using the 'EMAIL OR PRINT REPORTS/GROUPS' option.

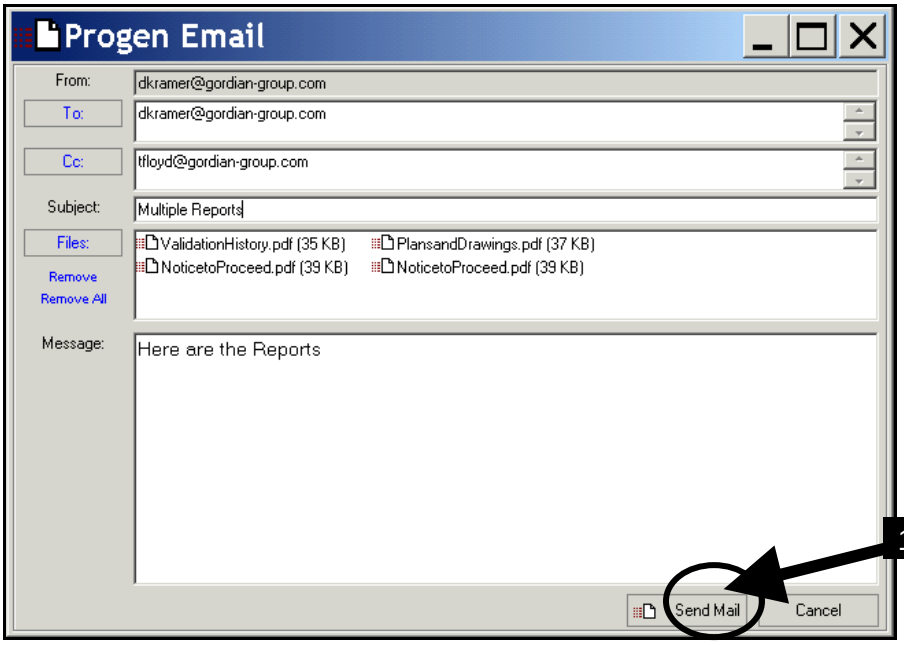


1) Right click on the corresponding folder and choose 'EMAIL OR PRINT REPORTS/GROUPS'.
2) The 'EMAIL/PRINT REPORTS' window will open.
3) Select the reports to send by clicking the check boxes next to them.
4) Click the (right arrow) to move the selected reports to the 'REPORTS TO EMAIL/PRINT' window.
5) Click the 'EMAIL' button.



6) In the 'EXPORT' window, place a check in the 'EMAIL' box and make sure that the format is PDF.





7) The 'PROGEN EMAIL' window will open. Enter a subject in the subject field.

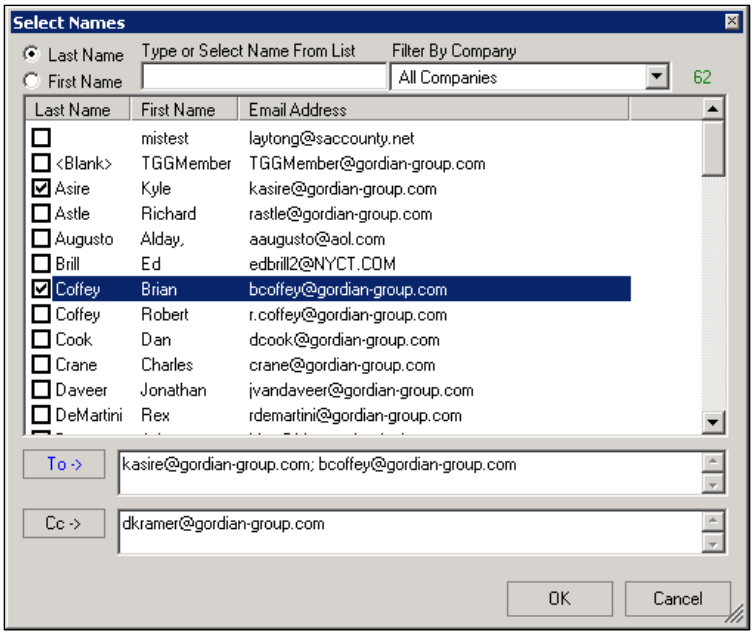
8) Enter any message to the recipient(s) in the message field.

9) Click the 'TO:' To: button to choose a recipient(s).

10) The 'SELECT NAMES' window will open. This listing shows only the contacts that have an email address entered in PROGEN.

   a) Click the check box next to the desired name(s).

   b) Click the 'TO - >' To -> button to enter the name(s) in that window area.



11) Click the 'OK' button and the Select Names window will close.

12) Click the Send Mail button on the 'PROGEN EMAIL' window to send the email. After receiving the message "The message was sent successfully," click 'OK'

TIP

Add a 'Subject' to the email. Some email systems will reject emails without a subject.

The legend of Gordian's Knot

According to Greek legend, it was prophesized to the Phrygians that their troubles would cease if they chose for King the first man to approach the Temple of Zeus in a wagon. A peasant named Gordius was the first to approach and was promptly named King. King Gordius dedicated his wagon to the God, fastening it to a pole with a knot that defied untying.

As years passed, legends arose that the man who could undo the Gordian knot would become ruler of all Asia. When shown the knot upon his invasion of Asia, Alexander the Great drew his sword, and cut it. Thus, "cutting the Gordian Knot" has come to stand for. . .

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